DOCUMENT RESUME

ED 126 936 52 IR 003 852

AUTHOR	Mavor, Anne S.; And Others
TITLE	The Role of the Public Libraries in Adult Independent Learning. Final Report.
INSTITUTION	College Entrance Examination Board, New York, N.Y.
SPONS AGENCY	Bureau of School Systems (DHEW/OE), Washington, D.C. Library Research and Demonstration Branch.
REPORT NO	P-OE-465192
PUB DATE	Jan 76
GRANT	OEG-0-72-5193
NOTE	193p.
EDRS PRICE	MF-$0.83 HC-$10.03 Plus Postage.
DESCRIPTORS	*Adult Education Programs; *Adult Learning; *Independent Study; Information Services; Library Planning; *Library Programs; Library Role; Library Services; National Programs; Professional Training; Program Evaluation; Program Planning; Public Libraries; State Programs; Surveys

ABSTRACT

The Office of Library Independent Study and Guidance Projects, College Entrance Examination Board and 11 participating public libraries report on the adult independent learning program. This is a historical and descriptive analysis of accomplishments between July, 1972, and June, 1975. Coverage includes project planning and coordinating activities at the national level, and service planning, staff training, and service testing and evaluation at the individual library level. The data represent the first efforts of the participating libraries to describe the adult independent learner, to characterize learning projects, and to evaluate the effectiveness of in-depth advisory and information support services. Appendixes contain training manuals, a sample training plan, and common data system forms. (Author/LS)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

ED126936

Final Report

Project No. OE-465192
Grant No. OEG-0-72-5193

THE ROLE OF THE PUBLIC LIBRARIES IN ADULT INDEPENDENT LEARNING

Anne S. Mavor
Jose Orlando Toro
Ernest R. DeProspo

College Entrance Examination Board

New York, New York

January 1976

The activity which is the subject of this report was supported in whole or in part by the U.S. Office of Education, Department of Health, Education, and Welfare. However, the opinions expressed herein do not necessarily reflect the position or policy of the U.S. Office of Education, and no official endorsement by the U.S. Office of Education should be inferred.

U.S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE

Office of Education
Office of Library Research & Demonstration

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

IR 003 852

ACKNOWLEDGMENT

There are many individuals who have made major contributions to this project. First, we would like to thank the library Directors who chose to have their libraries participate in the National Program. These directors were willing to commit personnel and material resources to the development of a new and untested concept of service for the adult independent learner. Without their commitment the project would not have been possible.

Second, we would like to extend special appreciation to all those individuals who have worked as learners' advisors. These advisors have been responsible for the day to day operation of the service and it is through their efforts that a better understanding of the learner-advisor interaction has been developed. Further, they have served as the record keepers and the data gatherers, providing the basis for describing the learner, the service and the service effectiveness.

Third, we would like to acknowledge the individuals in each library who have worked hard and long at developing plans, designing staff training and monitoring service testing. In addition to being system developers they have served as the links between planning group and administrators, and planning group and learners' advisors. It is impossible to specifically mention all of these individuals, however, we would like to list those who have acted as coordinators. They are listed below by library.

- Atlanta Public Library: Mr. Paul Porterfield, Miss Mary Louise Rheay
- Denver Public Library: Miss Anne Hidding, Mr. Thomas LeFree
- Enoch Pratt Free Library: Miss Emily Reed
- Miami-Dade Public Library: Miss Phyllis Gray
- Portland Public Library: Mrs. Barbara Smith, Ms. Doris Garber
- Salt Lake City Public Library: Mr. Thomas Phelps, Ms. Ranae Pierce
- St. Louis Public Library: Mr. James Michael

- Tulsa City-County Library: Mrs. Suzanne Boles
- Free Public Library of Woodbridge: Mr. Richard Greene, Ms. Jacquelyn Thresher
- New York State: Miss Dorothy Smith

Finally we would like to extend a special appreciation to the two project administrative assistants from the National Office, Ms. Lorna Doran and Ms. Gloria Morrow. They have provided much help in coordinating project activities.

PREFACE

This is a report on the work of the Office of Library Independent Study and Guidance Projects, College Entrance Examination Board and the public libraries that have participated in the program. The material presented in the following pages provides a historical and descriptive analysis of accomplishments between July of 1972 and June of 1975. Coverage includes project planning and coordination activities at the national level, and service planning, staff training and service testing and evaluation at the individual library level. The data included in this report represent the first efforts of the participating libraries in describing the adult independent learner, in characterizing learning projects, and in evaluating the effectiveness of in-depth advisory and information support services.

A second report will be published in August of 1976. This report will provide analyses, interpretations and projections based on the data collected by the libraries between July of 1975 and May of 1976. During this period, data will be collected using a common format which evolved from the work and experience of the libraries in the service testing phase. These data will be analyzed by a centralized computer facility. This will allow for the examination of relationships among data categories describing the learner, the learning project and the services. The aggregation of results across the libraries will provide the basis for stronger conclusions about public library service to independent learners and for projections to future service levels anticipated by both participating libraries and other public libraries interested in offering these services.

The work described in this report was funded by the Council on Library Resources, the National Endowment for the Humanities and the United States Office of Education, Office of Library Research & Demonstration. The findings do not reflect the position or the policies of any of these agencies.

TABLE OF CONTENTS

Section		Page
I	OVERVIEW	1
	A. Problem Statement	1
	B. Program Background	2
	C. Development of the Service Concept	3
	D. The Program with Individual Library Systems	6
	1. Selection of Program Participants	6
	2. Service Planning by Participating Libraries	7
	3. Training for Service Provision	7
	4. Service Testing and Evaluation	9
	E. The State-Wide Program	11
	1. Selection of A Participant	11
	2. Planning Activities	11
	3. Training Activities	12
	4. Service Activities	13
II	PROGRAM DEVELOPMENT BY THE NATIONAL OFFICE	15
	A. Problem Analysis	17
	1. Describe the Ideal Service	17
	2. Analysis of Libraries: Existing Conditions	18
	B. Selection of Program Participants	27
	C. Definition of National Program Goals	29
III	SERVICE PLANNING IN THE INDIVIDUAL LIBRARIES	33
	A. Organization of Program Planning and Evaluation Groups	36
	B. Training in the Program Planning and Evaluation Process	38

TABLE OF CONTENTS (Continued)

Section		Page
	C. Development of Service Plans	40
	D. Monitoring of the Service Test	42
	E. Discussion	43
IV	STAFF TRAINING IN THE INDIVIDUAL LIBRARIES	45
	A. Training Provided by the National Office	46
	1. Characteristics of Workshop Participants	46
	2. Description of Workshops	46
	3. Evaluation of Workshops	49
	B. Training Developed by the Individual Libraries	53
	1. Training Plan Development Model	53
	2. Specific Training Programs	55
V	PLANNING AND TRAINING IN THE STATE-WIDE PROGRAM	61
	A. Planning Activities	61
	B. Training Activities	64
	C. Service Activities	67
VI	SERVICE TESTING AND EVALUATION IN THE INDIVIDUAL LIBRARIES	69
	A. Purpose of Service Testing	69
	B. Organization of Service Tests	71
	C. Promotion of Service Tests	74
	D. Description of Service	76
	1. Advisory Service	76
	2. Information Support Services	77
	E. Description of Data Collection Forms and Procedures	79

TABLE OF CONTENTS (Continued)

Section		Page
	F. Results and Discussion of Service Testing	85
	1. The Communications Campaign	86
	2. The Learners	87
	3. The Learning Projects	91
	4. The Services	94
	5. The Allocation of Advisor Time	97
	G. Assessment of Service Tests	100
VII	A CLOSER LOOK AT FIVE LIBRARIES: SOME CASE STUDIES	103
	Atlanta Public Library	107
	Portland Public Library	125
	Salt Lake City Public Library	134
	Tulsa City-County Library	139
	Free Public Library of Woodbridge	145
	Case Study Conclusions	153
APPENDIX A - TRAINING MANUALS DEVELOPED BY NATIONAL FACULTY		A-1
APPENDIX B - AN EXAMPLE TRAINING PLAN		B-1
APPENDIX C - COMMON DATA SYSTEM FORMS		C-1

LIST OF FIGURES

Figures		Page
1	Three-Year Program Plan	16
2	CIPP Model	39
3	Alternative Team Organizations for Transfer Training	66
4	Effectiveness of Promotional Media	87
5	Age Distribution of Learners	88
6	Educational Distribution of Learners	89
7	Occupational Distribution of Learners	90
8	Management of Service Testing: Atlanta	110
9	Independent Learner Program Publicity Campaign: Atlanta	113
10	Independent Learner Program: Atlanta	114
11	Age Distribution of Learners: Atlanta	117
12	Educational Distribution of Learners: Atlanta	118

LIST OF TABLES

Table		Page
1	Adult Independent Learning Services	5
2	Library Users As Seen by Library Directors	22
3	Categories of Adults with Whom the Librarian Has the Most (and Second Most) Frequent Face-to-Face Transactions	22
4	Public Library Goals	24
5	Services the Library Does/Should Provide Regularly or Occasionally	25
6	Public Library Services for the Adult Independent Learner: Sample Plan	34
7	Changes in Level of Confidence for Each Service Category	52
8	Steps for Developing Specific Training Plan	54
9	General Training Area Identified by the Libraries	58
10	Service Test Organization in Individual Libraries	72
11	Performance Targets of the Individual Libraries	80
12	Data Collection Categories Covered by Forms in Each Library	82
13	Distribution of Learning Projects in the Dewey Decimal System	92
14	A Sample of Specific Learning Projects	93
15	Service Evaluation	95
16	Allocation of Advisor Time	98
17	Organization of Independent Learning Project: Atlanta	109
18	Flow of Training Information: Atlanta	112
19	Publicity Effectiveness: Atlanta	116
20	Distribution of Projects by Content Area of Interest: Atlanta	119
21	Distribution of Learner Contacts: Atlanta	120

LIST OF TABLES (Continued)

Table		Page
22	Project Goals and Evaluation Results: Atlanta	121
23	Allocation of Advisor Time: Atlanta	123
24	Service Profile: Woodbridge	150
25	Evaluation of Training Sessions Using Outside Consultants: Woodbridge	152

I. OVERVIEW

A. PROBLEM STATEMENT

There are a large number of adults who are actively involved in continuing their education. Evidence of this involvement is clearly shown in the national survey of 114,000,000 adults conducted by Johnstone and Rivera (1965)[1]. Their results indicated that 25,000,000 adults were engaged in some form of educational activity, and that 9,000,000 of these adults were pursuing a learning interest on their own, outside of a formalized educational program. More recently, the Educational Testing Service[2] sponsored a survey of the learning desires and activities of 3,900 adults. The results showed that 77% of these adults were interested in gaining more skill or knowledge in a selected area of interest. Some of the adults were pursuing their learning through formal, structured programs such as classes, correspondence courses and on-the-job training; some were pursuing their learning through independent study; others had not initiated any learning activity.

Of particular interest in both these surveys is the finding that many adults have elected to study and learn at their own pace, employing their own style of learning. These independent learners are pursuing the same goals as those enrolled in formal courses of study; they are interested in academic credit, they are working for job change or advancement, they are concerned with acquiring more knowledge or increasing their skill in a personal practical area. The principal difference between the formal adult learner and independent adult learner is the external support that is provided to the learning process. The formal learner is provided with both the direction and the resources of the institution he/she is attending; the independent learner has not had such support specifically available. Scattered efforts in educational planning and in

---

[1] Johnstone, J. W. C., and Rivera, R. J. Volunteers for Learning: A Study of the Educational Pursuits of American Adults. Chicago: Aldine Publishing Co., 1965.

[2] Carp, A., Peterson, R., and Roelfs, P. "Learning Interests and Experiences of Adult Americans," in Planning Non-Traditional Programs by Patricia Cross and John Valley. San Francisco: Jossey-Bass, 1974.

the provision of reading materials have existed but they have not been coordinated or well marketed. As a result, the independent learner and the individual who might become an independent learner have not had the services enjoyed by the learner associated with a learning institution.

The purpose of the current project has been to involve public libraries in the provision of services to support the learning and information needs of the adult independent learner. The public library was selected because it represents a major information resource in the community and because its primary function is to serve the community as an information center.

B. PROGRAM BACKGROUND

The first formal involvement of the public library with the independent learner occurred in 1970-1972. During this time period the staff of the College Level Examination Program, College Entrance Examination Board, worked closely with four public library systems in the development and testing of an information service for adults interested in gaining college credit by examination. The focus of this service was to make adults in the local communities aware of the college level testing program and its requirements, and to provide study planning and material support to those preparing to take examinations. The experiences of the libraries in this service program led to four major conclusions. First, the public library is an appropriate institution for disseminating information about non-traditional educational opportunities; the advertising efforts of the libraries generated a large number of inquiries about the testing program. Second, the librarian serving the adult learner needs training in helping the learner devise a plan of study. Third, coordination of problems and progress among the participating libraries would be helpful. Fourth, a system for evaluating the effectiveness of services is needed.

The results of this early work led to the establishment of the Office of Library Independent Study and Guidance Projects within the College Entrance

Examination Board in July of 1972. This office was jointly funded for a three year period by the Council on Library Resources, the National Endowment for the Humanities, the United States Office of Education, Office of Library Research & Demonstration and the College Entrance Examination Board. The functions of the National Office include:

- Identifying and describing services for adult independent learners.
- Encouraging public libraries in different areas of the country to participate in the planning and testing of services to independent learners in their respective communities.
- Providing participating libraries with training in both service planning and service provision.
- Assisting participating libraries in the testing and evaluation of planned services.

The National Office took two approaches to implementing its program. The first approach involved working with individual library systems; the second approach involved working with a state-wide system. Much of what was learned with the individual libraries in the way of training, service and evaluation was used in the state-wide program.

C. DEVELOPMENT OF THE SERVICE CONCEPT

A major focus of the National Office during the first several months was the identification of needed services and the development of a general description of these services. The sources used in this process included literature reviews, discussions with experts in decision-making and educational guidance, interviews with working librarians, a national survey of library directors and librarians, and a national goal-setting meeting attended by librarians, educators and leaders in the business community. The surveys of directors and librarians were used to describe the existing service objectives and service programs for adults, and to obtain the attitudes of librarians regarding future service priorities. The literature search and the discussions with the experts were used to identify and describe services that would be most

useful to the adult independent learner. The interviews with working librarians were used to determine the general attitudes of librarians towards the provision of specially designed, in-depth support services to the independent learner. The analysis and synthesis of these sources of information led to a general description of the needed services and the identification of the potential users of these services. This synthesis was accomplished at the National Goals Seminar, held at Wingspread in Racine, Wisconsin.

At this point in the program the potential user of the new services was considered to be any adult who was planning to become involved or was involved in a serious, sustained effort to learn independently of a formal institution. No restrictions were placed on either the goals or the content interest of the learner. Thus, a learner could be working toward academic credit, toward job improvement or toward the acquisition of a new skill or knowledge for purposes of personal development.

The services identified as being responsive to the independent learner were of two types: Advisory Services and Information Support Services. These services differed significantly from the traditional reference service in that they involved a close working relationship between the learner and the librarian advisor in developing a learning plan and selecting resources in the library and the community to implement the learning plan. This process implied a much more intensive interaction between the learner and the librarian advisor than had been practiced in the past. Basically, the librarian advisor would serve as a link between the needs of the learner and the resources available to satisfy those needs.

Table 1 shows a breakdown of the Advisory and Information Support Services. The Advisory Service is composed of two parts: diagnosis of learning need and development of learning plan. The process of diagnosing the learning need requires the learner and the advisor to work together to describe what the learner wants to achieve by the end of the learning project, the limiting factors

Table 1. Adult Independent Learning Services

Advisory Service		Information Support Service
Diagnosis of Learning Need	Development of Learning Plan	Selection of Resources
• Learning goals • Content area of interest • Learner's background in selected content area • Learning style preferences - Format (books, films, tapes, etc.) - Location (home, library, etc.)	• Approaches to learning • Sequence of learning	• Materials (print, visual, audio, etc.) • Guides to materials (study guides, reading lists, bibliographies) • Referral (inside library, outside library) • Learning events (group discussion, field trips, etc.)

on the content area of interest, what the learner already knows, and how the learner prefers to learn. The learner and the advisor need to develop a shared understanding of the learner's goal (academic credit, job advancement, practical skill, etc.), the dimensions of the content area of interest, the learner's background in the selected area and the learning method (books, films, small group discussions) and the learning location (library, home, etc.) most preferred by the learner. This shared understanding of goals, content and learning style provides the basis for constructing a meaningful learning plan.

The learning plan is the vehicle which describes how the learner gets from where he/she is now to where he/she wants to go. The first step in developing the plan involves the specification of various learning approaches which match both the learning needs and the styles of learning preferred by the learner. These approaches might involve combinations of print and

non-print material or a mixture of library and community resources. In this step the advisor draws on knowledge and experience of available resources which may meet the learning need. The second step in learning plan development is the sequencing of the learner's activities. This requires a specification of how the learner will begin and how he/she will progress through the learning project.

The information support services shown in Table 1 are used by the learner and the advisor to implement the learning plan. These services involve the provision of specific materials, the selection of specific community agencies for referral and the design of specific learning events to meet the learner's needs. As each information service is used by the learner, it should be evaluated for its usefulness to the learning project. These evaluations provide further direction for the next steps in the learning project. Feedback of this type might lead to extensive modifications or expansions of the original plan.

D. THE PROGRAM WITH INDIVIDUAL LIBRARY SYSTEMS

1. Selection of Program Participants

Concurrent with the service concept development work, the National Office was actively engaged in identifying library systems interested in participating in the program. Libraries choosing to participate would use their own resources to plan, test, evaluate and implement services for adults in their respective communities. The National Office would provide each participant with guidance in service planning, with training in service provision and with assistance in the service testing, evaluation and implementation work.

The selection of libraries to participate was based on recommendations from the American Library Association and on interest shown by libraries responding to the survey. Through this process twelve libraries were identified. Representatives from each of these libraries attended the National Goals Seminar

and were able to make their specific recommendations concerning project goals and the nature of services to be provided. Following this meeting each library was asked to sign a letter of commitment to the program. Eleven of the twelve libraries made this commitment.

2. Service Planning by Participating Libraries

In June of 1973 representatives from the participating libraries attended a model development seminar at Glen Isle on the Platte, Bailey, Colorado. One of the purposes of this seminar was to initiate the service planning process. Following a general orientation to program planning methods, the libraries were divided into three groups, each focusing on planning in one service area. The three planning areas were the advisory service, the use of library resources, and the development of an educational referral service. Preliminary service plans were then developed by each library. This planning process followed the steps outlined in the program planning method.

Further planning, delineation and evaluation of services was conducted over a one year period by Program Planning and Evaluation groups in each of the participating libraries. During this time, additional training and guidance in the program planning process was provided by the National Office. The planning groups were composed of librarians representing different positions in the library from administration to librarian on the floor. By June of 1974 each library had developed a full plan of services for its respective community of adults and had created a schedule for testing and implementing the plan. These plans included service objectives, service characteristics and procedures for service provision. In addition to the service plans, procedures and forms were designed by each library to aid in the evaluation of the service.

3. Training for Service Provision

Four basic areas of training for service provision were identified at the National Goals Seminar: Understanding the Adult Learner, Decision

Making and Educational Planning, Interviewing Techniques and Guiding the Learner in the Use of Study Materials. It was felt that a general coverage of these areas would provide the librarian who would be serving as an advisor with a better understanding of the adult independent learner, his/her learning needs and procedures for working with the learner to satisfy these needs.

A group of consultants was selected by the National Office to conduct the training. Training outlines for three* of the four areas were presented at Glen Isle to participating library representatives for their review and comment. Some revisions in both specific content and method of presentation were made at this seminar.

During the fall of 1973 and the spring of 1974 training workshops were conducted at each library in each of the four recommended areas. These workshops were attended primarily by members of the planning groups and by librarians who would be serving as advisors; however, in some cases the workshop was expanded to include clerical and support staff. In most of the libraries, follow-up sessions were conducted by selected staff members. The overall evaluation of the training sequence was generally positive although there was a feeling that some of the material presented was too general and could not be easily applied to the situations in which the advisor would be working. Based on this reaction it was felt that more training would be required for the advisors when they actually started to work with learners.

In August of 1974 a model for further training plan development was presented to the libraries at a conference held in Princeton, New Jersey. This model suggested that additional training conducted at each library be derived from the tasks of the advisor and the skill and knowledge associated with the performance of these tasks. During the fall of 1974 and the spring of 1975 participating libraries worked on developing training plans using this model.

*A consultant for interviewing techniques had not been selected at this time.

Training sessions resulting from these plans were conducted in several of the libraries. In some instances, sessions were provided by local consultants; the work of these consultants was funded by the National Office.

4. Service Testing and Evaluation

Service testing programs were initiated by nine libraries between August of 1974 and January of 1975. These tests have involved the provision of service to adult learners in the community and the evaluation of these services by both the learners and the librarian advisors working with the learners.

There were three general purposes for conducting the service tests. The first was to examine the feasibility of offering in-depth advisory and information support services to the adult independent learner through the public library. Could adult learning needs be identified, could learning plans be devised and could plans be implemented satisfactorily with library and community resources? The second purpose of the test was to modify and elaborate the planned procedures for working with the adult learner, and to link learning needs to the appropriate resources. What steps should the advisor follow in diagnosing a learning need, in developing a learning plan, in coordinating with community agencies? The third purpose of the test was to examine the effectiveness of the data collection systems for evaluating services. Were the appropriate data being collected, were forms easy to use, how should data be handled for summary purposes?

Each participating library designed and implemented its own service test and its own evaluation system. Since the basis for the testing programs was to gain more knowledge about the provision of the service and its acceptability and judged usefulness to learners, most of the libraries began by offering services on a small scale. As knowledge was gained, services were expanded. Some of the libraries limited their learners by selecting a specific target group: adults interested in academic credit, adults interested in

vocational change or advancement. Other libraries limited their service test to one or a small number of locations in the system. All of the libraries offered advisory and information support services. These services were advertised to the community using a variety of media: newspapers, radio, television, brochures, in-library displays. Some of the publicity used was designed at the national level, other materials were locally developed.

Although each of the libraries designed an evaluation system to satisfy its unique needs, most of the data collection categories were common across the libraries. That is, the libraries were asking the same questions and attempting to demonstrate success in similar areas. The service testing program led to many changes in data collection forms and procedures. The libraries found that the initially designed data collection forms were difficult to use and did not provide all of the needed data. In some cases questions were dropped because they provided useless information.

In May of 1975 a common data collection and evaluation system was designed from the forms being used by the participating libraries. The four major data collection profiles included in this system are: the Learner Profile, the Service Profile, the Institutional Profile and the Communications Profile. The Learner Profile deals with questions of who is the adult learner, what does he/she want to learn and how does he/she prefer to learn. The Service Profile is concerned with the services that were provided and the usefulness of those services as judged by the learner and by the advisor. The Institutional Profile focuses on issues of personnel time and material cost associated with service provision. The Communication Profile deals with assessing the effectiveness of various methods of publicizing the service. This common evaluation system will be used by all of the libraries during 1975-1976. The data collected will be analyzed monthly by a computer; this analysis will provide results for each library and across all libraries. The basic function of this analysis is to provide input into decisions to modify or expand services.

Service tests were conducted by nine libraries. These tests ranged in time from six to ten months. A summary of data collected by the libraries during the service tests shows that 1,617 adult learners were identified, and that 54% of these used the service more than once. Of the learners who have evaluated the service, 88% indicated overall satisfaction, 97% would use the service again, and 96% would recommend the service to a friend. Evaluations of specific services ranged from 68% of the learners finding needed materials available to 93% experiencing a positive working relationship with the advisor.

E. THE STATE-WIDE PROGRAM

1. Selection of A Participant

New York State became interested in the independent study program through their state librarian who attended the National Goals Seminar in April of 1973. The initial interest was formalized into a general commitment to participate in the program following a series of meetings between representative of the National Office and members of the New York State library administration. This commitment led to the formulation of a State Planning Committee with the assistance of the Division of Library Development, State Department of Education.

2. Planning Activities

Planning in New York State differed significantly from the planning conducted by the individual library participants. In New York State the first concern was that all libraries in the state recognize the feasibility of the independent study program. The second concern was that these libraries agree to participate in training conducted by the National Office. This training would enable them to provide in-depth advisory and information support services. Essentially, the function of the state planning group was to encourage acceptance, to coordinate efforts of participating libraries and to organize the overall training plan.

The first work of the State Planning Committee was to plan a state-wide conference to encourage librarians in the state to accept the program and to agree to training. This meeting, held in Sagamore, New York, in October of 1973, was attended by representatives from 22 library systems. The outcome of the meeting was general agreement on the need for service to the adult independent learner through the library and on the need for training. Many of the activities during this meeting were guided by representatives from four of the individual libraries participating in the National Program. These libraries had already begun the service planning process and had made initial decisions about training.

Following the conference the State was organized into three regional planning and training areas: New York City Metropolitan Region and two up-state regions. The New York City Region created a Metropolitan Planning Group which has been active in planning and coordinating both training for library administrators and staff, and in developing a publicity campaign for advertising the service.

In March of 1975, representatives from libraries in the New York Metropolitan Region attended a workshop on program planning and evaluation. A good portion of the workshop was devoted to presentations and demonstrations by three of the individual libraries participating in the program. These presentations were aimed at giving a first-hand view of how a planning and evaluation model can be used to plan a service in the library. This was the first exposure of librarians in New York State to the service planning process. New York Public Library, Queens Borough Public Library and Brooklyn Public Library have used the model to develop service plans.

3. Training Activities

The decision made at the Sagamore meeting was that the training areas needed in New York State were the same as those being offered to the individual library participants. These were: Understanding the Adult Learner,

Decision Making and Educational Planning, Planning with the Self-Directed Adult Learner, and Guiding the Learner in the Use of Study Materials.

The training organization and procedure used by New York State was different than that employed in the individual libraries. In the individual libraries, staff members received training directly from the National Office consultants. This training was followed up by mini-workshops conducted by library staff. These two sessions were attended by the same individuals. In New York State a transfer training concept was applied. Each library system appointed a team leader and a group of team members. The team leader usually had an administrative role in adult services. Members of the teams attended a series of training sessions conducted by the consultants employed by the National Office. The job of the team was to take the material presented by the consultants and use it to train librarians in their respective systems. This procedure has been tried extensively in the New York Metropolitan Region and has met with much enthusiasm and acceptance from staff members who have received training from a team.

4. Service Activities

New York Public Library plans to initiate a service test in September of 1975. This test will be conducted in five library centers. It is expected that both Brooklyn and Queens Borough will also begin service testing in the fall. These libraries will be using the common data collection system developed through the experience of the nine individual libraries who have actually engaged in service testing.

II. PROGRAM DEVELOPMENT BY THE NATIONAL OFFICE

The Office of Library Independent Study and Guidance Projects was established at the College Entrance Examination Board in July of 1972. The function of the office was to conduct a three-year program aimed at involving public libraries in the planning, provision and evaluation of advisory and information support services to the adult independent learner.

The first step taken by the National Office was the development of a three-year program plan. This plan detailed the major tasks involved in designing and implementing the National Program. These tasks are presented in Figure 1. The first section of the plan was devoted to problem analysis which included tasks associated with developing an idealized service model, describing the existing library services for adults and the attitudes of librarians toward services that should be offered, and analyzing the gaps between existing services and the idealized service model. The second major plan section involved the identification and selection of libraries to participate in the program. The third section of the plan was the development of a conceptual model of service to the adult independent learner. This process involved two tasks: a definition of program goals to be used as guides by participating libraries and the specification of planning and training steps to achieve program goals. The inputs to the conceptual model development were to be the results of the problem analysis and the ideas of potential library program participants, educators and representatives of the business community. These three sections of the plan were scheduled for the first year of the program. The second year of the program was devoted to the fourth section of the plan. This section involved two tasks: the planning of services by each library and the training of staff in service provision. Guidance in these efforts would be provided by the National Office. The third year of the project involved plan sections five and six. Section five was the conduct of service tests

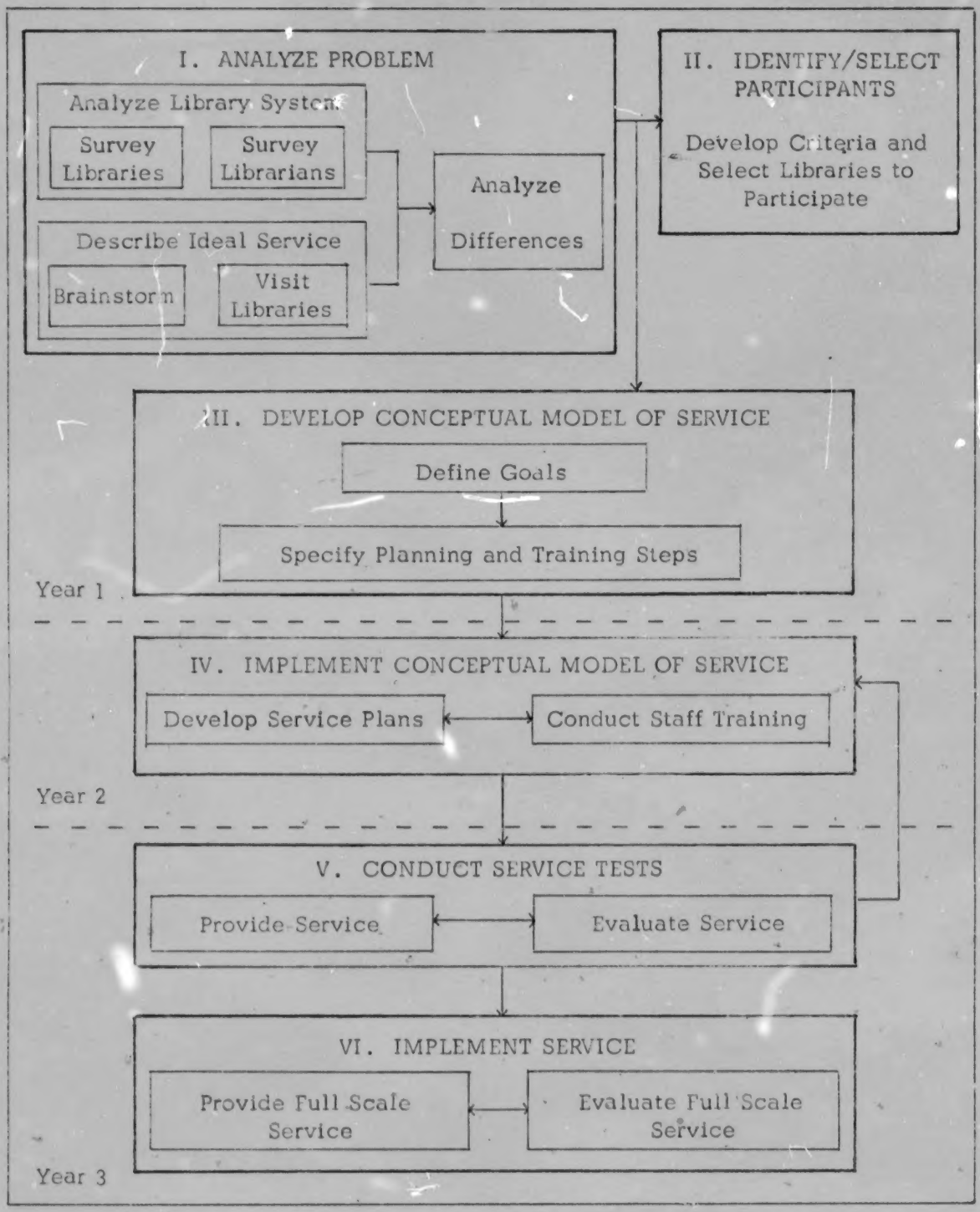


Figure 1. Three-Year Program Plan

based on the service plans devised by each library. These tests included the provision of services on a limited scale and the evaluation of these services. The sixth section of the plan involved implementation of the service. This task would be guided by the results obtained from service tests.

The remainder of this chapter will focus on the activities of the National Office during the first year of operation: Problem Analysis, Selection of Library Participants and Development of the Conceptual Model.

A. PROBLEM ANALYSIS

1. Describe the Ideal Service

Three sources were used in developing a description of the ideal service for adult independent learners. The first source was a review of the literature on the adult independent learner, his/her motivations and goals and the types of projects that have been initiated to achieve these goals. This characterization of the adult independent learner provided a statement of service requirement: who is to be served, what are the learning goals, what are the styles of learning. The statement of service requirement served as the initial guideline in developing the ideal service model.

The second source of input to the ideal model was a series of meetings with experts in decision making and educational guidance. These meetings led to four major conclusions about the service concept.

- Any adult who chooses to meet a learning need through serious, sustained independent study should be considered as a candidate for support services.
- Advisory as well as information support services should be offered.
- Advisory services involve in-depth consultation with the learner for purposes of describing learning goal, diagnosing learning needs and developing a plan of study to meet those needs through use of library and community resources.

- Advisory service provision requires an understanding of decision making and educational planning as well as the willingness and the skill to guide learners in their learning activities.

The third source of input to the ideal model was a set of personal interviews with librarians who had participated in offering services to adults showing interest in the College Level Examination Program. These interviews were held with librarians from five library systems: Dallas Public Library, Denver Public Library, Miami-Dade Public Library, St. Louis Public Library and selected members of the Serra Regional Library System including the San Diego Public Library. The interviews were conducted by the Director of the National Office and their purpose was to determine what had been done for learners interested in credit by examination and what the librarian felt should have been done for these learners. The majority of the librarians in the interview sample indicated that very little educational planning had been provided for adult learners who had contacted the library. This appeared to be a result of two factors: the adults did not expect such extensive assistance and the librarians did not feel prepared to offer this assistance. Most librarians, however, did state that their jobs should involve extensive work with adults and that educational guidance and learning plan development was an appropriate role for a librarian if adequate training in these skills was provided. One important observation made by librarians throughout the interviews was that a need existed for evaluative feedback on service being provided. This observation reinforced the requirement for an evaluation system to be developed as part of the ideal service delivery system. It was felt that service could be adjusted and improved only if feedback was continually obtained from the individuals who were making use of the service. Procedures should be built into the service delivery process that would allow the advisor and the learner to evaluate the learning project as it progressed.

2. Analysis of Libraries: Existing Conditions

The analysis of existing conditions in public libraries throughout the country was based on the results of two questionnaire surveys conducted

by the National Office.* The criteria for selecting libraries to be included in the survey were as follows:

- The library must be open to the general public at no cost to the patron.
- The library must serve patrons directly.
- The library must offer materials of a general nature.
- The library must have a book budget of at least $5,000.

A review of the 1972-73 Library Directory based on these criteria led to the selection of 2,795 libraries.

The first questionnaire, Survey of Libraries, was mailed to directors of the 2,795 libraries. The purpose of this questionnaire was to obtain a description of existing goals, services, and staff training programs related to adults in the community. Questions were designed to determine whether service to the adult independent learner was a library priority and whether advisory services existed to support the learner. Specifically, the questionnaire covered the following areas:

- Description of material budget, size of collection, composition of collection, facilities, staff size and characteristics and number of branches.
- Use of the collection in terms of types of material and categories of users.
- Goals of the library and their relative priority (e.g., build the best possible collection, provide guidance service to adult learners).
- Criteria for assessing the library's effectiveness (circulation statistics, number of reference questions).
- Time spent by the adult service librarian in clerical work, reference, educational planning, community programs, etc.
- Type and frequency of training offered to professional staff (e.g., academic counseling, community relations, evaluative techniques) and the methods used in the training (e.g., closed circuit TV, tutorials, on-the-job training).
- Types of services offered to adults inside the library (e.g., book talks, tutorials, career guidance).

*Alfred Gitlitz contributed to questionnaire design and analysis; Kay McGinty contributed to the analysis and interpretation of results.

The second questionnaire, Survey of Librarians, was mailed to 2,795 librarians in main public libraries and to 2,400 branch librarians. The purpose of this questionnaire was to obtain the attitudes of librarians regarding what library goals should be, what services should be and what additional staff training would be most desirable. This questionnaire focused on the following areas:

- Educational background and number of years experience as a librarian.
- Characterization of the library in terms of population, budget, size of collection, number of branches.
- Goals that the library should have and their relative priority.
- Services that should be provided to adults inside the library.
- Activities that the library should participate in (e.g., debate on community issues, science fairs, art shows).
- Specific training received prior to and following the start of a career in librarianship (e.g., academic counseling, career guidance, building management); desired training.
- Methods of instruction which have proven most effective in the past (e.g., tutorials, on-the-job training).
- Present and desired distribution of time to library duties.
- Types of assistance most frequently provided to patrons and types of assistance that should be provided (e.g., directions to materials, selection of general reading, planning a program of study).
- Types of adult patrons and the relative frequency of contact with each type (e.g., adults engaged in independent educational activity, adult engaged in home related activity, etc.)
- Types of assistance that should be provided to an adult about to engage in an educational activity (e.g., helping adult identify personal values, helping adults develop strategies to achieve their personal goals).

Completed questionnaires were returned by 800 (27%) library directors and 1,037 (21%) librarians. Although questionnaires were received from libraries of all sizes (serving 25,000 to over 100,000 individuals) and

geographic areas, an analysis showed that a greater relative percentage was returned by libraries serving populations of more than 25,000 people and holding material collections of more than 25,000 volumes. This finding tended to indicate a greater potential for interest in service to the independent learner on the part of larger libraries. The geographic distribution of respondents matched the distribution of mailed questionnaires.

The size of the library collections reported by respondents ranged from 25,000 volumes to more than 1,000,000 volumes. With regard to the distribution of materials within these collections, 2% of the directors indicated having predominately fiction, 57% indicated having predominately non-fiction and 41% indicated having an equal number in each category. Approximately 80% of the libraries with collections of 100,000 volumes or more reported a greater percentage of non-fiction materials. In addition to material resources, library directors reported on equipment and facilities available to the public. These included photocopy machines, phonographs, projectors, microfilm/fiche readers, cassette recorders, and rooms for small group learning activities.

Characteristics of library users as perceived by the directors responding to the questionnaire is provided in Table 2. The percentages in this table are based on the number of directors who ranked each group as either their first, second or third heaviest library users. These percentages indicate that housewives are the heaviest users followed by college students and professional and business workers. Table 3 characterizes adult library users by the purpose of their library use as perceived by librarians. This table indicates that the most frequent face-to-face contact between librarian and adult is for the purpose of recreational and leisure activity (76%). This purpose is followed by home-related activity (66%), job-related activity (22%), independent educational activity (22%), and personal development (6%).

In the Survey of Libraries, library directors were asked to rank nine public library goals from most important to least important for their library. In the Survey of Librarians, public service librarians were asked to rank the same

Table 2. Library Users* as Seen by Library Directors

Housewives	89%
College Students	54
Professional and Business	45
Office Workers	30
Senior Citizens	25
Blue Collar Workers	16.
Unemployed and Economically Disadvantaged	2
Agricultural Workers	2
Military	1
Adults for Whom English is a Second Language	**

*Categories of users ranked 1, 2 or 3 for usage.
**Less than 0.5 percent.

Table 3. Categories of Adults with Whom the Librarian Has the Most (and Second Most) Frequent Face-to-Face Transactions (Base = 1,037)

Adults engaged in recreation/leisure activity (e.g., mysteries, westerns, bestsellers, hobbies)	76%
Adults engaged in a home-related activity (e.g., gardening, home repairs, child care)	66
Adults engaged in a job-related activity	22
Adults (non-students) engaged in an educational activity (e.g., Great Books, history, literature)	22
Adults engaged in a personal development activity (e.g., public speaking, personality development, speed reading)	6

nine goals in terms of what they thought should be their degree of importance. Table 4 compares the results of the two groups. The percentages in this table are based on the number of directors and librarians who ranked each goal as first, second or third in importance. The results show almost total agreement in the priorities assigned by the two groups; the only shift in priority is that librarians assigned slightly more importance to playing an initiatory role in identifying and providing programs for community needs than did library directors. Both directors and librarians indicated highest priority for serving the community as a center for reliable information. This goal was followed in importance by building the best possible collection and motivating the public to use the library. Very few of the respondents assigned high priorities to the goals relating to the provision of services for adult independent learning activities. Only 7% of the directors and 8% of the librarians gave a rank of "1", "2" or "3" to the goal of providing guidance services to adults engaging in educational activities; the goal of providing adults with individualized learning experiences received high rankings by only 4% of the directors and 3% of the librarians.

In the area of service provision, library directors were asked to indicate those services which were offered regularly or occasionally to adults while librarians were asked to indicate those services they thought should be offered. The responses to this question are presented in Table 5. A review of the directors responses shows that only four of the nineteen services were being provided by 50% or more of the libraries. These services include exhibits, displays, film programs and book talks. In contrast, sixteen of the nineteen services were selected by more than 50% of the librarians as services that should be offered to adults. The three services checked by less than 50% of the librarians include: Academic Counseling, Tutorials and Programmed Instruction. In order to assess the relative priorities of service

Table 4. Public Library Goals

	By Library Directors (Are now Goals)	By Adult Services Librarians (Should be)
To serve the community as a center of reliable information	85%*	86%
To build the best possible collection and to organize it for ease of access	80	77
To motivate the public to use the library and to recognize its importance in their lives	58	58
To play an initiatory role, with other agencies and institutions, in identifying community needs and providing programs and services to meet those needs	19	26
To provide opportunity for recreation through use of literature, music, films, and other art forms	24	21
To support the educational, civic, and cultural activities of groups and organizations	13	10
To provide guidance services to adults engaged in or who intend to be engaged in an educational activity	7	8
To provide adults with individualized planned learning experiences	4	6
To provide local government officials with information and perform research as needed	3	2

*Received a rank of 1, 2 or 3 in importance.

Table 5. Services the Library Does/Should Provide Regularly or Occasionally

	Director (Does Provide)	Rank	Librarians (Should Provide)	Rank
Exhibits	79%	1.5	92%	4.5
Displays	79	1.5	93	2.5
Film programs	69	3.0	92	4.5
Book talks	50	4.0	96	1.0
Discussion groups	41	5.0	93	2.5
Lectures	39	6.0	87	6.0
Planned reading programs using mass-produced subject reading list	24	7.0	80	8.0
Exhibits for loan purposes	23	8.0	80	8.0
Career guidance	21	9.0	61	15.0
Concerts	19	10.0	79	10.0
Planned reading programs using individually adapted reading lists	15	11.0	77	11.0
Advice in designing program of independent study	13	12.5	71	13.0
Reading improvement program	13	12.5	73	12.0
Tape cassette instruction	11	14.0	69	14.0
Scheduled readers' consultations	7	15.0	80	8.0
Programmed instruction	6	16.0	48	17.0
Tutorials	4	17.5	35	18.0
Academic counseling	4	17.5	27	19.0
Closed-circuit TV or video tape instruction	3	19.0	54	16.0

as they exist and as they should be, ranks were assigned to the directors' responses and to the librarians' responses: the service category with the highest percentage was assigned a rank of "1", the next highest percentage was ranked "2", etc. The rank-order correlation resulting from a comparison between the existing and the desired was r = .89. This indicates that statistically there is a high positive relationship between the relative priority of provided services and of desired services. The only two service areas where large discrepancies appear are career guidance, which has a higher relative position in the existing service framework, and scheduling readers' consultation, which has a higher relative position in the desired service rankings. In general, services which were oriented specifically to the adult independent learner were not emphasized either in the existing situation or in the desired service state. Further, it is of interest to note that very few librarians spent much time or felt they should spend much time in assisting adults in educational decisions and in planning programs of self-directed study.

With regard to training programs for library staff, directors were asked to indicate the subject/skill areas in which training was offered by the library or encouraged through outside sources; librarians were asked to respond to the same subject/skill areas in terms of the additional training they desired. In comparing these responses it was found that library directors put most emphasis on librarianship (circulation and reference), librarianship (technical services), and general library administration while librarians most desired additional training in community relations, outreach services to the disadvantaged and adult education. Neither the directors nor the librarians assigned much importance to the area of training for academic counseling.

It would appear from these questionnaire survey results, that the existing situation in the public library did not emphasize and was not geared to the provision of focused support services for adult independent learners.

With very few exceptions, emphasis was placed on traditional goals, services and training areas both by libraries and by librarians. Over 50% of the directors and librarians surveyed saw no evident demand or need for advisory services to the independent adult learner. In this context, the development of a successful national program of individualized service to adult learners through the public library would require a reorientation of existing attitudes and programs. Perhaps the place to start would be with the larger libraries: these libraries have larger collections, more facilities and a larger staff; they might be more responsive to planning, testing and incorporating advisory services into their existing operation.

B. SELECTION OF PROGRAM PARTICIPANTS

The process of selecting individual libraries to participate in the program was conducted concurrently with the problem analysis. The first decision made by the National Office was to limit the selection to larger libraries. Other criteria employed were that the library be motivated to participate, that the library show an interest in developing innovative service programs for adults and that the library be willing to take calculated risks.

Participation in the National Program meant that the library would use its own staff and materials to plan, test and implement advisory and information support services for adult learners in the community. No financial reimbursement would be provided by the National Office for time spent or work accomplished on these tasks. The National Office would provide, however, assistance in service planning, training in service provision and guidance in service testing and evaluation. This concept of participation grew out of the philosophy that an organization is more likely to implement and internalize a new program if the staff of the organization takes the responsibility for planning, testing and evaluating the program; commitment of resources to a new idea is a strong indication that the organization will work hard for implementation of the idea.

Three sources were used in the process of identifying potential program participants. The first source was a list of sites recommended by officers of the American Library Association. The second source was the responses of libraries to a brochure "A Design for Learning in the Public Library." This brochure was mailed to librarians along with the survey questionnaire. The third source of potential participants was the four libraries that had worked with the College Level Examination Program in providing information to adults about credit by examination. Contacts were made by the National Office with all libraries identified. In some instances, several meetings were held to discuss the program and its implications in a specific library situation. This process resulted in eleven libraries making a commitment to the program. These commitments were signed agreements acknowledging the role of the library and the role of the National Office in the accomplishment of each program task. The smallest of the eleven libraries serves an area of between 50,000 and 100,000 people and has a library collection of less than 500,000 volumes; the largest library serves a population of over 500,000 individuals and has a library collection in excess of 1,000,000 volumes. The libraries making program commitments follow:

- Atlanta Public Library, Atlanta, Georgia
- Cleveland Public Library, Cleveland, Ohio
- Denver Public Library, Denver, Colorado
- Enoch Pratt Free Library, Baltimore, Maryland
- Miami-Dade Public Library, Miami, Florida
- Portland Public Library, Portland, Maine
- Salt Lake City Public Library, Salt Lake City, Utah
- St. Louis Public Library, St. Louis, Missouri
- Tulsa City-County Library, Tulsa, Oklahoma
- Free Public Library of Woodbridge, Woodbridge, New Jersey
- Worcester Public Library, Worcester, Massachusetts

A twelfth library, Milwaukee Public Library, was invited to participate but did not sign a letter of commitment.

In addition to gaining participation by individual library systems, the National Office was interested in working with a state-wide system. The proposed working model for the state-wide approach differed from that used with the individual systems. Here training and planning would be provided to teams of individuals who would disseminate this information to librarians in their library systems.

New York State became interested in the program through the State Librarian. After several meetings conducted with library administrators, the state appointed a planning group to work on organizing a state-wide conference. The results of this conference led to a commitment by librarians in the state to participate in the National Program.

C. DEFINITION OF NATIONAL PROGRAM GOALS

The National Goals Seminar was held in April of 1973 at Wingspread in Racine, Wisconsin. The purpose of this seminar was to examine discrepancies between the existing and the ideal service for adult independent learners, and to develop a National Goal Statement agreeable to all participants. Attendance was composed of representatives from 15 public libraries (including the 11 program participants), educators, members of the business community, leaders of women's groups and National Office staff and their consultants.

The first part of the seminar was devoted to four position papers dealing with various aspects of the problem analysis. The first paper, presented by Houle, focused on the adult independent learner and the potential role of the public library in the linking of learning needs with learning resources. The second paper, presented by DeProspo, provided a description of existing conditions in the public library. Data for this paper were obtained from the two surveys conducted by the National Office and from previous research

efforts of the author. The material presented led to the conclusion that most libraries have traditional goals and they pursue these goals through the provision of traditional service; lowest priority is given to user activities involving educational considerations. Further, the existing background and training of librarians has not provided them with skill and knowledge needed to offer in-depth advisory service to adult learners. The third paper was presented by Monroe and provided a framework for viewing the library as a community learning center. The purpose of this paper was to show a series of service models which ranged from conservative, the library as an information resource, to totally innovative, the library as an active participant in diagnosing needs, in creating study plans and in using resources to meet the needs of both independent learners and community problem-solving groups. The final paper, presented by Hiatt, discussed procedures for moving library service from the traditional position to the innovative, ideal position. It was recommended that libraries who chose to participate in the national program devote the next year to developing plans for service provision and to staff training.

In the second part of the seminar participants formed into teams to discuss program goals, service characteristics and training needs. The goal agreed upon in these discussions was that public libraries should work to support and enhance the learning activities of adults working independently. The services identified as implementing this goal were:

- Helping the independent learner to specify both learning goals and the steps needed to reach those goals.
- Helping the learner plan a program of study.
- Providing the learner with methods of assessing his/her level of progress at various stages in his/her project.
- Guiding the learner in the selection and use of study materials.
- Bringing the learner into contact with agencies and individuals in the community that can support his/her learning needs.

- Providing the learner with information about educational events in the community which relate to his project.
- Making group learning sessions available in the library.
- Organizing the library facilities to encourage its use as a learning environment.

Librarians identified training needs in five areas. The first area was planning and evaluation. It was felt that each library should make its own planning decisions but that guidance in methods of planning would be useful. The other four recommended training areas were specifically related to the knowledge and skill needed by the librarian who would be providing advisory and information support services to the adult independent learner. These areas included: Understanding the Adult Learner, Decision Making and Educational Planning, Interviewing Techniques and Guiding the Learner in the Use of Study Materials.

The results of the National Goals Seminar set the stage for the work to be accomplished in the next two years by libraries participating in the national program. The efforts of the individual libraries in the areas of service planning, staff training and service testing will be discussed in Chapters III, IV, and VI. Chapter V will be devoted to the project planning and training efforts in New York State. Chapter VII presents a case study of one library.

III. SERVICE PLANNING IN THE INDIVIDUAL LIBRARIES

Service planning efforts by the eleven participating libraries began in June of 1973 at the Model Development Seminar held at Glen Isle on the Platte, Bailey, Colorado. One of the purposes of this seminar was to bring together the participating libraries for an orientation to the planning process and for some practice in the use of this process.

During the first day, a presentation was made on the basic principles of program planning and evaluation. This discussion described a planning model and showed how this model could be applied to the development of new activities in the library setting. The remainder of the seminar was devoted to two activities: further specification of services and development of preliminary plans by each library. Specification of service was accomplished by three small group discussions, each focusing on one aspect of service to the adult independent learner: Group I was responsible for examining the libraries' learning environment; Group II described the development of an educational clearinghouse and referral service; Group III worked on the development of learner advisory services which included educational planning, guiding the learner in the use of study materials and study program scheduling. The discussions of each group were directed towards specifying service goals, describing the service setting and identifying the actions and resources required to achieve service goals.

The second activity, development of preliminary service plans, was accomplished by each library individually. Participants worked on their plans by following the procedures discussed in the service planning model. These preliminary plans represented the first step toward the planning of service for adult independent learners to be offered through the public library. Table 6 shows an example plan.

Table 6. Public Library Services for the Adult Independent Learner: Sample Plan

GRAND DESIGN: To meet the independent learning needs of the community.

I. Goal - The Library shall provide the proper environment for effective independent learning.

Objective - The Library shall adjust collection to meet the needs of independent learners.

Sub-objective - The Library shall obtain appropriate printed educational materials.

Sub-objective - The Library shall obtain appropriate educational materials from other media.

Objective - The Library shall provide physical facilities to meet the needs of the independent learner.

Sub-objective - The Library shall provide adequate space to accommodate the independent learner.

Sub-objective - The Library shall assign staff that is knowledgeable, accessible, and perceptive to meet the needs of the independent learner.

II. Goal - The Library shall offer an educational and informational clearinghouse and referral service. The informational clearinghouse and referral service will be immediately incorporated into the Neighborhood Information Centers. This service shall be developed at a later date throughout the system.

Objective - The Library shall direct the independent learner to other educational agencies that can help him pursue his learning project.

Sub-objective - The Library shall maintain a file of educational agencies and the services they offer that may aid the independent learner.

Sub-objective - The Library shall maintain personal contacts with these agencies in order to effectively guide the independent learner to the appropriate serivce.

Objective - The Library shall make potential independent learners aware of educational opportunities, experiences, and events currently available in the local community, as well as nationally available programs.

Table 6. Public Library Services for the Adult Independent Learner: Sample Plan (Continued)

Sub-objective - The Library shall make information concerning TV courses, lectures, films, plays, concerts, etc., available to the independent learner.

III. Goal - The Library shall provide an independent learner consulting service. This independent learning service will be incorporated into the Neighborhood Information Centers and the Reader Services Department of the Central Library. This service shall be developed at a later date throughout the system.

Objective - The Library Learning Consultants shall assist the independent learner in decision making and educational planning.

Sub-objective - The Library Learning Consultants shall employ interview techniques that enable them to better identify the needs of the independent learner.

Sub-objective - The Learning Consultant and independent learner shall establish rapport in order to jointly evolve an independent learning project.

Objective - The Library Learning Consultants shall guide the independent learner in the use of study materials.

Sub-objective - The Library Learning Consultants shall provide reading lists and/or study guides upon request of the independent learner.

Sub-objective - The Library Learning Consultants shall introduce the independent learner to printed educational materials (programmed texts, vocational and career guidance materials, textbooks, etc.)

Sub-objective - The Library Learning Consultants will assist the independent learner in the use of non-print educational materials (records, cassettes, microfilm, films, microfische, etc.)

A. ORGANIZATION OF PROGRAM PLANNING AND EVALUATION GROUPS

Following the Model Development Seminar each library established a Program Planning and Evaluation Group. The function of these groups during the first year was to develop a long-range plan of services for the adult independent learner, to develop a service test plan for examining services on an experimental basis, and to develop a data collection and evaluation plan for describing various aspects of service delivery and service effectiveness during the testing period. In the second year, group members served as service test monitors, as service test evaluators and as training program developers in areas where staff skills and knowledges needed further development.

Membership in the Program Planning and Evaluation Groups was for the most part by invitation; one library, however, formed its group on a totally volunteer basis. The most frequent selection criteria employed were that top library administration be represented and that those divisions of the library working with service to adults be included. In some libraries there was a concern that participatary management concepts be employed and in these cases representatives were invited from all levels in the library. In other libraries there was a concern for program acceptance at the working advisor level so potential learners advisors were invited from both central and branch libraries. In two of the libraries, it was felt that an individual with skill in evaluation should be included in the group. The size of these groups ranged from five to sixteen members.

Four different organizational structures emerged as the groups began to function. The first organization was the entire group working together on every aspect of the plan with each group member having an equal chance to raise issues, suggest alternatives and make assessments. In some libraries this proved to be a workable process, and although it was slow and tedious at times, was found to be most rewarding. Several of the libraries, however,

found this organization unwieldy, particularly where larger groups were involved; full group meetings were difficult to schedule and agreement was hard to attain. In light of these difficulties two other organizational structures evolved. One structure involved dividing the larger group into smaller task forces which concentrated on different aspects of planning. These smaller task forces developed recommendations in their area of responsibility and presented them to the full group for consideration and final decision. Another structure was the development of a small executive committee which met frequently and made many of the key decisions. This approach led to more efficient planning but less effective implementation; many of the members on the full planning group lost interest in the program. One of the libraries making use of the executive committee organizational structure found it unworkable and returned to the full group decision making structure.

The fourth organizational structure employed the establishment of two groups: a small planning group and a large extended-project group. The planning group was composed of representatives from top administration, middle management, the central library and the branches; the extended-project was composed of staff members from central library departments and from each participating branch. The function of the planning group was to develop alternatives, present these alternatives to the extended-project group and make final plan selections. The work of the extended-project group involved assessing alternatives and making recommendations to the planning group. This organizational structure was extremely effective in involving a large number of individuals in the planning and decision making process. This involvement led to positive attitudes by staff in implementing the service test.

Three conditions have been identified as being important contributors to the success of the Program Planning and Evaluation Groups. First, the backing of top library administration is necessary. Without a commitment at the

management level, the planning group has little authority in implementing new services in the library. Second, the planning group members must develop a cohesive working relationship. Planning is a difficult and time consuming process and group cooperation is essential to its success. Third, the planning group needs to develop effective communication links with library staff involved in implementing the service. Lack of communication results in misunderstanding and an unwillingness to participate in the program.

B. TRAINING IN THE PROGRAM PLANNING AND EVALUATION PROCESS

Program Planning and Evaluation Workshops were presented to each library's planning group by a consultant employed by the National Office. In some instances joint workshop sessions involving two or more libraries were also conducted. The workbook for these sessions is referenced in Appendix A.

The purpose of these workshops was to provide a framework for the service planning process, a model which detailed the steps involved in moving from a general statement of service philosophy to an implementable service plan. Eight sequential inter-related planning steps were discussed.

- Description of Need: What are the needs in the community, what is the library already doing to meet these needs, what additional services are required?
- Definition of Service Goals: What is the general, long-range intent of the new services?
- Definition of Service Objectives: What specifically will be accomplished by the service? There may be several objectives which relate to one service goal. Objectives should be stated in terms of measurable outcomes. They serve as the guidelines for action plan selection.
- Identification of Action Alternatives: What are the ways in which service objectives can be accomplished? In this step as many alternatives as possible should be identified.
- Selection of Most Appropriate Action Alternative: What alternative or set of alternatives best meets the service objectives? What alternatives are feasible in terms of available resources?

- Delineation of Action Steps: What steps are required to accomplish each action alternative and what resources are needed to accomplish each step? Action steps should be evaluated in terms of how they will meet service objectives.
- Development of Plan for Service Implementation: In what order should the action steps be accomplished? How much time is required for their implementation?
- Development of a Plan for Service Evaluation: What information is needed about each action step to determine its effectivness in meeting service objectives? What are the desired results and how will data be collected to make appropriate measurements?

Each step in the service planning process from goal definition to service implementation requires a series of decisions. These decisions are based on various kinds of information obtained from a wide variety of sources. A model characterizing the information requirements at each planning stage was presented to workshop participants. This model organizes the information into four categories: Context, Process, Input, Product (see Figure 2). Context information refers to the conditions under which action plans will be

	Context (What's out there?)	Input (What to do about it?)	Process (Is it being done?)	Product (Was it done?)
Delineate (What information is needed?)				
Obtain (How should information be collected?)				
Provide (How should information be summarized?)				

Figure 2. CIPP Model*

*Developed by Daniel Stuffebeam, former Director: Ohio State University Evaluation Center.

implemented. This category includes such questions as who are the potential users, what are their needs, what are the services already available in the community and what are the constraints within the library? Input information is concerned with the strengths and weaknesses of alternative methods or procedures for implementing selected action plans. Questions to be addressed by this category include: who will provide the service and what are the training requirements; what facility exists and what additional facilities are needed; and what are the projected costs in terms of personnel time and materials. Information provided under Context and Input is designed to facilitate decisions about goals, objectives, action plans and strategies for accomplishing action plans. Process information relates to efficiency of procedures used in service delivery. This information results from data collected during service testing. Product information is concerned with the success of the service. Issues here focus on who is using the program and their level of satisfaction, how much service provision costs, and how services should be expanded.

The model also includes three procedural steps for insuring that appropriate information is generated in each of the four categories. The first step is to delineate the questions to be answered and the information to be obtained. The second step involves devising a means for obtaining needed information. The third step requires the provision of relevant information to the appropriate decision maker. This model was used extensively by all groups in the performance of their program planning and evaluation tasks.

C. DEVELOPMENT OF SERVICE PLANS

Service plan development in each of the libraries was accomplished during the fall of 1973 and the spring of 1974. Throughout this period the planning groups met on the average of once every two weeks.

The preliminary plan outlines created at the Model Development Seminar provided the starting point; most of the libraries concentrated their efforts on developing specific action plans for implementing the advisory and referral services discussed at the seminar. The initial work of the planning groups was to define goals and service objectives for their specific communities. General descriptions were developed of potential adult learners and of the services that were already available in the community and through the library. One of the major focuses of this planning stage was obtaining agreement on the role of the library in the education of the adult independent learner. Planners found this to be a long and involved process as many inputs, opinions and attitudes needed to be considered and discussed.

Once goals and objectives were specified the planning groups began work on identifying and describing alternative ways of meeting the service objectives. The procedure here was for group members to identify as many alternatives as possible. Each alternative was then examined in terms of its feasibility and its effectiveness in achieving service objectives. Feasibility was determined by assessing the resources required to implement the alternative and comparing these resources with those available in the library. Many alternatives were eliminated by this process.

The third step involved the development of implementable service plans for selected alternatives. These plans included specification of service delivery procedures and the selection of library personnel and resources for providing the service.

Most of the libraries developed a series of planning documents ranging from general outlines to detailed descriptions of all planned services. Additionally, a service test plan was designed by each library. These plans described the services that would be tested, the procedures that would be used and the adult learner groups that would be served. The purpose of the services test was to try out a planned service on a limited scale and to

assess its workability and effectiveness. Accompanying the service test plan was a service evaluation plan which included service performance targets and data collection forms for obtaining needed evaluative information. Guidance in the development of these evaluation plans was provided by the National Office. During the summer of 1974 representatives from each library attended two meetings on evaluation procedures and principles of forms design. One meeting was held at the College Board Office in New York City, the other was conducted in Princeton, New Jersey.

D. MONITORING OF THE SERVICE TEST

In the fall of 1974 and the spring of 1975, nine of the eleven libraries initiated service tests based on their plans. During this period the role of the planning groups shifted to collecting data and monitoring the service operation. Much effort was expended in developing data collection schedules, and in establishing procedures for summarizing and reporting results. Communication links were set up with librarians serving as advisors so that service procedures could be assessed and modified where necessary. In some of the libraries these links proved to be very effective. Meetings were scheduled regularly in which planners and advisors were able to discuss problems arising in both the service provision and in the documentation of the service. Planners also held individual discussions with advisors. These meetings and discussions had several positive effects. First, they allowed advisors and planners to express their respective attitudes about the service. Second, they provided a means for clearing up misunderstandings about procedures for working with the learner. Third, they served as a basis for identifying weaknesses in the data collection system. As a result needed modifications were made in both services and data collection procedures. In other libraries, the communication procedures were not as effective. Where breakdowns occurred, both the service and the documentation of the service suffered.

The reporting of data and the use of data as an input to policy decisions has posed problems in all of the libraries. No effective procedures have been established for determining who should get what reports and when these reports should be provided. Work needs to be done in the area of specifying the decisions to be made and the levels of personnel involved in the decision process. As the service is expanded, advisors, planners and library administrators will all be making decisions. Some of these decisions will concern minor procedural adjustments while others will involve major changes in library policy.

E. DISCUSSION

The experience gained in working with the Program Planning and Evaluation groups has led to a number of interesting observations concerning group organizational structure and group process in service planning, service monitoring and service evaluation. Although it is too soon to conclude that a specific organization or process is superior several hypotheses have been generated. These hypothesis form the basis for a future testing program. They are as follows:

- There is a positive relationship between the active participation of the director as a member of the Program Planning and Evaluation team and the quality of both the Learner's Advisory Service and the evaluation data system.
- There is a positive relationship between the inclusion of an online learner's advisor as a full member of the Program Planning and Evaluation team and the quality of both the service and evaluation components of the program.
- There is a positive relationship between the sophistication of the evaluation data system and the quality of the Learner's Advisory Service. Conversely, the more simplistic the data system and the greater the evaluation information gaps, the less active and intensive is the service.
- The skills and knowledge acquired by active members of the Program Planning and Evaluation team in such areas as Policy formation, Forms design, Coding, Information Processing and

Handling (i.e., research) tend to isolate them from other members of the library staff. Consequences are a resulting weakening in the internal communication network of the library, fragility in the Program Planning and Evaluation process, and extensive energy and commitment by Program Planning and Evaluation team members to maintain the system.

IV. STAFF TRAINING IN THE INDIVIDUAL LIBRARIES

The need for training in the provision of advisory services to adults was first identified by librarians who worked with the College Level Examination Program in providing adults with information on credit by examination. These librarians indicated a requirement for additional skill and knowledge in the areas of learning need diagnosis and learning plan development. At the National Goals Seminar, these and other training areas were further elaborated. Suggestions resulting from this seminar were based on a general analysis of the skill and knowledge required to provide the proposed advisory and information support services. These suggestions included: Understanding the Adult Learner, Decision Making and Education Planning, Interviewing Techniques and Guiding the Learner in the Selection of Study Materials. Presentations in three* of the four suggested training areas were made by National Office consultants to participating library representatives at the Model Development Seminar. Comments by librarians on both content and method led to modifications in how consultants planned to conduct the library staff workshops.

The discussions in this chapter will focus in two areas: training provided by the National Office and training designed and conducted by the individual libraries. The National Office training was conducted in each of the eleven libraries during the fall of 1973 and the spring of 1974. This training involved a series of four one-day workshops presented by National Office consultants. Half-day follow-up sessions to these workshops were conducted by library staff in several of the libraries. The training designed by the individual libraries was scheduled during the fall of 1974 and the spring of 1975. This training focused on the specific skill and knowledge requirements of the learners advisor role.

*No presentation on interviewing.

A. TRAINING PROVIDED BY THE NATIONAL OFFICE

1. Characteristics of Workshop Participants

A variety of methods was used in selecting workshop participants. In some libraries representation was required from the main departments of the central library and from each of the branches; in other libraries the participation was voluntary. Additionally, the background of participants and their role in the library differed from one library to another. Some libraries were interested in focusing the workshop presentations on staff members who would be working with adult learners, other libraries were interested in exposing their entire staff to the program. The participants ranged from highly experienced to new professionals to clerical and support staff; each of these groups brought a different set of expectations and perspectives to the workshop experience.

The workshop participants had three major functions in the program. The first function was to upgrade their skill and knowledge in working with adult independent learners. That is, to incorporate the information provided in the workshops into their existing background and to use this new information to enhance their job performance. The second function of this group was to provide inputs to the planning group in terms of suggested services and the conditions and constraints associated with implementing those services. The third function was to provide evaluative feedback on each workshop regarding both content coverage and method of presentation.

Workshops were also attended by planning group members and by individuals on the library staff selected to conduct follow-up sessions in each of the four content areas.

2. Description of Workshops

The four workshops provided through the National Office were designed to achieve two objectives. The first objective was to provide service planners and library staff with a general understanding of the factors involved

in offering advisory and information support services to the adult independent learner. It was felt that this understanding would create a comprehensive framework for the service planning process. The second objective was to provide library staff with the skills and knowledges required in working with the adult independent learner to plan programs of study and to offer individually tailored information support.

Coordination and scheduling of workshops in each library was accomplished at the national level. Recommendations were made that the workshops be presented at one month intervals and that they move from general to specific in terms of content coverage starting with understanding the adult learner and proceeding through decision making, interviewing and guiding the learner in the use of study materials. Most of the libraries followed these recommendations, however, others chose to alter both the sequence and the timing. The purpose and content coverage of the four workshops is briefly described in the following paragraphs. The workbooks developed for three sessions are listed in Appendix A.

The purpose of the workshop on Understanding the Adult Learner was to provide librarians with knowledge in adult interests, adult learning styles and adult learning needs. Specifically the workshop focused on:

- Increasing awareness of the types of adult learning activities and of the factors which motivate adults to involve themselves in independent study.
- Developing an understanding of the adult learner and how he differs from the child.
- Developing an awareness of the research literature on adult learning, adult interest and participation to learn, and changes in the adult through the life span.
- Increasing skill in diagnosing adult learning needs.
- Providing a description of the types of roles that might be played by the librarian and the adult as they work together on an independent study project.

Case studies characterizing potential adult learners were presented and discussed by all participants.

The second workshop, Decision Making and Educational Planning, was designed to enhance skill in making decisions and in aiding others in their decision making process. This presentation described the role of decision making in each stage of the learning process from selecting a learning goal to choosing a learning method to evaluating the success of the learning project. The steps involved in the decision making process were discussed and participants were asked to complete a series of exercises using these steps. The steps are as follows:

- Recognizing and defining the decision to be made.
- Determining the desired goals and objectives.
- Examining the available information and searching for additional sources.
- Assessing the risks and costs involved in choosing each alternative.
- Developing a strategy for attaining the desired objective.

The purpose of the Interviewing and Need Diagnosis workshop was to provide librarians with a set of procedures for working with the adult learner to identify, describe and structure information needs. Emphasis was placed on the kind of information that should be obtained in the interview and the way in which this information should be organized to provide a basis for responsive information support over time. It was suggested that the content of the interview with the learner be structured around the tasks of a learning project and that the librarian organize the information obtained around these tasks. The five basic learning project tasks presented were:

- Identifying the learning objective: Why is the learner interested in learning?
- Determining the scope of the study effort: What are the content interests and how should they be delimited?
- Determining the sequence of the study effort: What does the learner already know, where should the project begin?

- Selecting study resources: What are the preferred styles of learning?
- Reviewing and integrating information obtained from resources: What type of study aids are required?

Following the outline of the need diagnosis procedures, participants were asked to engage in role playing exercises.

The fifth workshop, Guiding the Learner in the Use of Study Materials, was geared to increasing knowledge about categories of adult learners and categories of materials, and to increasing skill in linking materials to adult learning needs. The primary emphasis in this workshop was placed on the development of individually tailored reading study guides. An outline of the five major steps in creating a study guide were presented. These steps included:

- Determining the scope, structure, depth and special emphasis of subject to be covered.
- Developing a draft outline or bibliographic essay.
- Consulting selective bibliographic guides to the subject field.
- Determining which materials are essential, supplementary, amplifying of special interest.
- Checking availability of titles in the resources of the library and in other local information facilities.

3. Evaluation of Workshops

Evaluative information on the workshop program was obtained from four sources. The first source of information was immediate feedback from workshop participants. Although this feedback focused on the strengths and weaknesses of each workshop presentation, comments were also received on the program as a whole. The second source of evaluative information was the meeting of the eleven libraries held during the American Library Association meeting in January of 1974. At this time each library reviewed and commented on the workshops they had received. The third resource was a conference held in

Sterling Forest, New York, which involved workshop leaders, three librarians and office staff. During this conference, the existing training program was assessed and future plans were developed. The fourth source was a general evaluation questionnaire which was sent to all participants at the end of the workshop sequence. The purpose of this questionnaire was to obtain an overall assessment of the total training experience.

The information provided by these sources led to the following conclusions. First, the workshop sequence was generally effective in providing an overview of the factors associated with service to the adult independent learner. In most of the libraries the workshops were well received and participants indicated an increased understanding of the material covered. A few of the libraries, however, showed some dissatisfaction with the training. This dissatisfaction resulted from a mismatch between the expectations of the participants and the coverage of the workshops. Some librarians expected to become totally proficient in the advisory function as a result of the workshops, others expected the workshops to deal only with applications to their specific problems while still others expected additional topics to be covered. Unfortunately, the workshop sequence was not specifically attuned to each library's situation. Perhaps if more communication had existed between librarians and workshop leaders some of these expectations could have been better met. It was not possible, however, in the time alloted, to provide complete skill training. This area was a focus for the continuing training efforts developed in each individual library.

Second, librarians' confidence in working with the adult learner did increase as a function of the workshop sequence. Assessment of this confidence shift was based on the responses of 280 librarians from ten libraries* to the final evaluative questionnaire. In this questionnaire, librarians were

*One library did not respond.

asked to rate their confidence from one to five (one being lowest) prior to and following the workshop sequence in each of six areas listed below:

- Helping the learner identify and clarify his learning goals.
- Helping the learner identify the conditions which shape the nature of his learning project.
- Helping the learner plan a program of study to meet his learning goals.
- Helping the learner in selecting library materials useful to his learning project.
- Helping the learner by developing individually tailored learning guides.
- Helping the learner through referral to other learning opportunities in the community.

The average confidence across libraries and service areas prior to the workshop presentations was 2.6. These scores ranged from a low of 2.3 (preparing learning guides) to a high of 3.5 (selecting useful library materials). Following the workshops the average confidence was 3.7 with a range of 3.6 (preparing a program of study, providing referrals) to 4.0 (selecting useful library materials). Table 7 provides a breakdown by the planning group and the workshop group for each library in terms of the change in confidence from before to after the workshops in each service category. In looking at the service areas, it would appear that the largest gains in confidence were achieved in three areas: helping identify learning conditions, helping in the development of a learning plan, and developing individually tailored learning guides. The least change in confidence was found in the selection of useful materials. This is due to the fact that many of the respondents indicated a high degree of confidence in this service area prior to the workshop program. In comparing the ten libraries across the services, the range of confidence increase is from .53 to 1.51 for the workshop groups and from .72 to 2.05 for the planning groups. In four libraries the planning groups showed a slightly higher gain in confidence, in four other libraries the workshop groups showed a higher gain, and in two

Table 7. Changes in Level of Confidence for Each Service Category*

Library	Help Clarify Learning Goals		Help Identify Learning Conditions		Help Plan Program of Study		Help Select Useful Materials		Help Develop Individual Learning Guides		Help Through Referral		Mean	
	Work-shop Group	Plan-ning Group	Work-shop Group	Plan-ning Group	Work-shop Group	Plan-ning Group	Work-shop Group	Plan-ning Group	Work-shop Group	Plan-ning Group	Work-shop Group	Plan-ning Group	Work-shop Group	Plan-ning Group
1	1.7	.8	1.9	.5	1.8	1.4	1.1	.7	1.8	.7	.8	.9	1.51	.83
2	0	.9	1.0	.7	1.0	1.1	0	1.1	0	.9	1.0	.7	.50	.90
3	.7	1.2	0	1.0	1.1	1.0	.4	.6	1.0	1.1	.4	.4	.60	.88
4	1.2	2.2	1.5	2.2	1.5	2.0	.5	1.3	1.2	3.0	1.0	1.6	1.15	2.05
5	.9	1.2	1.3	1.1	1.3	1.1	1.0	.8	1.1	1.5	1.0	.9	1.25	1.15
6	.9	1.5	1.6	1.1	1.5	1.4	.7	1.0	1.4	1.3	1.4	.6	1.10	1.10
7	.8	.5	.7	1.0	.9	2.5	.5	0	1.4	1.5	.6	0	.82	.76
8	1.0	.8	1.0	.7	1.1	1.3	.4	0	1.0	.6	.7	.9	.86	.72
9	.6	1.6	.6	1.3	.4	.9	.6	.5	1.1	.8	.6	.5	.65	.93
10	.6	.7	.6	.9	.8	.5	.4	.2	.4	.8	.4	.2	.53	.54
Mean	.84	1.14	1.02	1.05	1.14	1.32	.56	.62	1.04	1.22	.79	.67		

*Difference in confidence ratings on an ascending scale from (1) to (5) from pre-training to post-training.

libraries no difference was indicated. Although there are differences in the confidence changes from one library to another it is important to note that in all cases some increase is shown. This increase in confidence was one of the major goals of the workshop program.

B. TRAINING DEVELOPED BY THE INDIVIDUAL LIBRARIES

1. Training Plan Development Model

Most of the libraries felt that additional training to supplement and augment the workshop series would be required for effective implementation of the advisory service. This assessment was based on two sources: the attitudes of librarians who would be offering test services, and the feelings of the planning groups who had generally compared the workshop training with their specific service plans. As a result a model was developed to assist the libraries in identifying further training requirements and in designing training activities. This model was presented to representatives of ten libraries at a meeting held in Princeton, New Jersey, during August of 1974.

The Training Plan Development Model is composed of a series of logical steps for reaching a set of training plans tailored to helping the librarian work effectively with adult independent learners (Table 8). The first step in this process is to identify the tasks that the librarian will have to perform in implementing each of the planned service programs. This requires a detailed analysis of the librarian's job. One procedure recommended for accomplishing this analysis is the rational, deductive approach which involves starting with a statement of service objectives and analytically specifying the tasks that the librarian must perform in order to accomplish those tasks. A second recommended procedure is the empirical, inductive approach. In this approach the librarians' tasks are identified through an analysis of the work the librarian is doing in providing service to the learner. The second step in the process of developing training programs is to identify the skill(s) and the knowledge(s)

Table 8. Steps for Developing Specific Training Plan

Objectives	Requirements			Training
Services	Competencies Needed to Implement Service Steps	Present Level of Competency for Each Step	Gaps in Competencies to Implement Service Step	Training Plan to Develop Competencies for Performing Each Service Step
• General Description • Specific Tasks and Steps	• Skills • Knowledge	• Skills · Acquaintance Level · Working Level • Knowledge · Acquaintance Level · Working Level	Training in • Skill • Knowledge	• Self-directed. Independent study by librarian: reading, etc. • Library directed. On the job training • Externally directed. · Formal courses · Workshops conducted by outside experts, etc.

63

which are needed by the librarian in performing each service task. That is, what does the librarian need to know and what does the librarian need to be able to do to insure effective task performance. Skill(s) and knowledge(s) can be identified through rational analysis and through observing or interviewing librarians concerning the requirements for their work. The third step in the process involves an assessment of the librarian's existing level of competence in each knowledge and skill area identified as required for effective task performance. Three methods were suggested for making competency assessments: examine education and experience, have librarians assess their confidence in each area, devise tests to measure level of competency. The fourth step involves the identification of gaps between required knowledge(s) and skill(s) and existing competencies of librarians. These gaps represent the areas where training is needed. The final step in the process is the development of specific training programs to meet identified needs. In this step attention is given to assessing alternative methods for providing each needed skill and knowledge.

Each library was provided with a workbook to assist in training plan development efforts. This workbook contained a suggested format for a training plan document and a series of worksheets for each step in the development process. The first set of worksheets provided space for identifying the librarians' tasks in each service area and for listing the skill and knowledge requirements associated with the performance of each task. The second set of worksheets offered structure for analyzing specific training needs. These sheets contained a series of columns for indicating existing competencies, training needs, and suggested training method(s) for each skill and knowledge area identified.

2. Specific Training Programs

Seven libraries have made use of the method presented in the model for assessing their training needs and for developing responsive training

programs. Some developed very detailed plans, others' plans were more general. All who followed the analytic process, however, found each step challenging. It is not a simple process to breakdown a service into meaningful tasks and to identify all skills and knowledges associated with each of these tasks. The resulting training plans were formatted to include selected training areas, content coverage, service tasks and desired skill(s), knowledge(s) and attitude(s). In Woodbridge and Tulsa, specific training areas were derived through staff self assessment on each skill and knowledge identified as useful in service task performance; those areas receiving low confidence ratings formed the basis for the training program. Salt Lake City selected training areas by analytically comparing skill(s) and knowledge(s) with background and experience of the learners advisors. Other libraries relied on advisors to indicate the specific areas where training was required. Appendix B shows an example of the development, conduct and evaluation of training as it occurred at the Free Public Library of Woodbridge.

Woodbridge identified four staff groups, each to receive a different level of training. Training Group I was composed of advisors; this group received detailed training in all aspects of service delivery. Training Group II was made up of staff members who would handle initial contacts with adults but would not get involved in advising on learning projects. This group received more general training focusing on project characteristics, interviewing techniques and resources of the system. Training Group III was composed of all public service clerical staff and Training Group IV of non-public service clerical staff. These two groups received in-house training on the characteristics of the service to adult learners and on the various roles librarians assume in offering this service. The sessions for Group III were somewhat more detailed than those conducted for Group IV. Most of the other libraries

defined either one or two training groups; only those involved in the advisory function; or advisors and other library staff coming in contact with the public.

Table 9 provides an overview of the general training areas identified by each of the libraries. Four of the libraries conducted general orientation sessions for the library staff. The purpose of these sessions was to inform all personnel about the new services for adult learners and the ways in which these services would be operated in the library. In five libraries, formal in-house training has been given to advisors on the philosophy and mechanics of service delivery; Salt Lake assigned highest priority to training in this area. Topic coverage includes characteristics of services, (advisory, clearinghouse, etc.) procedures for providing service, data collection forms, and methods of service evaluation.

In addition to the service orientation sessions, training has been planned in a number of content areas; some of the topics represent further training in the areas treated in the National Workshops, other topics are new. Four libraries indicated that more knowledge was needed by advisors on what motivates the adult learner and on ways in which adults approach learning situations. One particular concern was the effect of age on the learning process. Five libraries identified additional training requirements in Educational Planning and Decision Making. The sessions conducted on this topic covered how decisions are made and how to help others make decisions. Specific examples and practice exercises focused on the decision-related tasks of the advisory service (e.g., how to aid a learner in selecting an objective). The major difference between these sessions and the National Workshop was the use of examples relating specifically to the Learner's Advisory Service. All seven libraries identified further training needs in interviewing and interpersonal communications. Training plans in this topic area were directed toward acquisition of the following skills: effective listening, question formulation, making the learner feel comfortable, drawing the learner out, organizing

Table 9. General Training Area Identified by the Libraries

Training Areas	Libraries						
	Atlanta	Miami	Port-land	St. Louis	Salt Lake City	Tulsa	Wood-bridge
• General orientation of library staff to service		x	x	x			x
• Philosophy and mechanics of service delivery for advisors			x	x	x	x	x
• Adult motivations, learning styles, etc.				x	x	x	x
• Educational planning, learning plan development			x	x	x	x	x
• Interpersonal communications, interviewing techniques	x	x	x	x	x	x	x
• Group discussion techniques			x		x		
• Bibliographic skills	x						x
• Reading: acquisition of skill, assessment of level	x						x
• Educational uses of non-print media			x				x
• Educational assessment techniques						x	x
• Research methods			x				
• Resources in the library		x	x				x
• Resources in the community			x			x	x

and summarizing the learner's responses. In the area of material selection three topic areas were selected: Bibliographic Skills, Reading, and Educational Uses of Non-Print Media. Training programs on bibliographic skills related to questions of how to use standard reference tools, how to use subject reference tools and how to compile subject bibliographies. Training in reading focused on acquisition of reading skills, reading deficiencies, techniques for assessing reading level and methods for determining the reading level of a piece of material. Sessions in the Educational Uses of Non-Print Media concentrated on providing knowledge regarding advantages and limitations of various media for independent study and on skill in selecting media appropriate to different learning situations.

New training areas identified by the libraries include techniques for assessing the knowledge level of the learner, research methods as they apply to libraries, material resources of the library and learning resources available in the community. Knowledge level assessment was identified as a training need in two libraries. Programs developed in this area concentrated on indicators of knowledge and learning ability, on instruments for testing knowledge level and on interpretation of results from commonly used tests. The use of research methods was selected by one library. Planners at this library felt that librarians should develop the ability to conduct surveys, to develop case studies and to design statistical summaries.

Three libraries planned and conducted in-house training on the resources of the library. The purpose of these sessions was to provide advisors with an awareness of bibliographic tools, of materials and of staff skills. Training on resources in the community generally focused on the services offered by agencies and institutions that related to the independent learning program.

Three methods have been employed for conducting training. One method involved the use of library staff members. This procedure was followed for the general staff orientation sessions, for the service philosophy and

mechanics sessions and for content areas where staff expertise existed. A second method was to select local consultants to provide training. In this situation, library staff members responsible for training developed a set of specifications and worked with selected consultants on training session design. Time spent by consultants in planning and training was paid for by the National Office. The third method, devised by library staff at Tulsa, involved the design of learning packages in each training area; packages contain a mixture of video tapes, written materials, demonstrations and live lectures. These packages will be offered to other libraries showing an interest in developing services for the adult independent learner.

Most of the training designed and conducted under the guidance of the individual libraries has received positive evaluations from library staff. Responses indicate that the material presented has matched closely with expectations and that participants are gaining more confidence in their role as learners advisors. Impact of training on the quality of service, however, has not yet been measured. Evidence on this question will be collected during the next year. Three procedures were used for obtaining feedback on training sessions: evaluation forms designed by consultants, evaluation forms designed by libraries, oral evaluations solicited at the end of each training session.

V. PLANNING AND TRAINING IN THE STATE-WIDE PROGRAM

One of the early decisions of the Office of Library Independent Study and Guidance Projects was to explore the possibilities of a state-wide approach to developing public library services for the adult independent learner. Basically the concept was to implement this approach in parallel with the work being done by the individual libraries and to use the experiences and results obtained in the individual situations as guides for the state-wide effort.

New York State initially became interested in the National Program through its state librarian who attended the National Goals Seminar at Wingspread in April of 1973. Following this seminar, a series of meetings was held between the director of the National Office and representatives from the New York State Library Administration. These meetings led to a general program commitment by state representatives and to the formulation of a state-wide planning committee. The function of this committee was to organize and coordinate project activities of public libraries in the state. The material presented in this section describes the work accomplished on the adult independent study project in New York State during the last two years.

A. PLANNING ACTIVITIES

The first task of the state-wide planning committee was to provide information to libraries within the state on the independent learning project and to gain a commitment from these libraries to participate in the project. This task was accomplished through a seminar held in October of 1973 at Sagamore, New York. The specific purposes of this seminar as outlined by the committee were as follows:

- A recognition among participants that it is feasible to implement some facet of a library independent study program in almost any library setting.

- A commitment to participate in training sessions provided by the National Office.
- A statement of existing and desired goals, conditions and services in New York State.
- A set of suggestions for developing cooperative efforts with community agencies.

Directors of 22 library systems in the state were invited to select two to four individuals to participate; 18 library systems were represented at the seminar. The library systems were of three types: cooperative, federated and consolidated. Cooperative systems are private with local control for local decisions; they have a policy making board which is elected by member libraries. Federated systems have a public base with a policy making body appointed by a legislative body, however, each local library has control over local decisions. Consolidated systems have one policy making body which controls the entire system. In addition to the libraries from New York State, the seminar was attended by representatives from four of the individual libraries participating in the National Program and by National Office staff and their consultants. The representatives from the individual libraries served as resource persons throughout the seminar, answering questions and leading discussions on the concepts of service planning, training and evaluation.

Prior to the seminar, each committed participant was sent a copy of three papers presented at the National Goals Seminar, the preliminary service plans developed at the Model Development Seminar, and the report from the National Interest Council – Dallas Independent Study Project. Topics covered by the papers from the National Goals Seminar included the existing situation in public libraries, some models of service to independent learners, and the steps required to move from existing to desired conditions of service. These materials were to be reviewed as part of the preparation for the seminar.

The first portion of the seminar was devoted to descriptions of National Program goals and activities. A presentation was made on the service concept

and on the early meetings held with State representatives concerning the implementation of this concept on a state-wide basis. This was followed by a description of the adult learner and his/her learning needs and styles. Representatives from two of the individual libraries, Portland and Tulsa, then discussed the ways in which a public library reaches the decision to plan for the provision of new services to the adult independent learner.

In the second portion of the conference the participants formed into four task force groups to discuss the existing and desired position of New York State libraries with regard to the provision of service to adult independent learners. The specific work of these groups was to develop service models for four types of libraries: a small library with one librarian, a library with an adult services librarian on the staff, a central or large library with specialized staff and a library system. Each task force had a leader, a resource person from an individual library, and four reporters (one from each type of library). All members were provided with a workbook to aid in structuring discussions. The first part of the workbook addressed issues concerning existing conditions in libraries; the second part dealt with desired conditions for providing services to adult independent learners.

The four task force groups reached a consensus statement of goals and implementing tasks. The desired goals were expressed as reaching and serving every potential adult learner, cooperating with other educational agencies, and providing materials most likely to be used. Recommendations of participants included:

- Assessing resources, both human and material in order to use them more effectively.
- Developing methods to measure and evaluate library services and policies so they can be improved and expanded as appropriate.
- Exploring ways to share special skills of staff in larger libraries and systems with staff of smaller libraries in remote areas.
- Opening or expanding channels of communication with community and state education agencies and institutions.

- Establishing training programs to develop staff skills in interviewing, psychology of the adult learning process, decision making, guiding the adult learner in the use of study materials and assessing adult needs.
- Publicizing new and expanded services to potential adult learners in the community and the state.

The results of the seminar led to the organization of libraries into three regions for purposes of staff training and service planning: New York City Metropolitan Region and two Upstate regions centered in Rochester and Schenectady. Throughout the training and planning stages, participating libraries were provided with funding from the Library Services and Construction Act to free staff for training and to purchase additional library materials judged as needed to support the adult independent learner.

B. TRAINING ACTIVITIES

New York State used a team transfer approach for training. Each participating library system selected a team of five or six representatives to receive training from national consultants in the four areas of understanding the adult learner, educational planning and decision making, interviewing techniques, and guiding the learner in the use of study materials. Following these sessions team members prepared and presented training sessions to library staff within their respective systems. The first region to begin training was the New York Metropolitan Region. The first session in this region was held in the spring of 1974. Training in the two Upstate regions was initiated in the fall of 1974.

During the winter of 1973-74, the New York Metropolitan area established the Metropolitan Regional Planning Committee to organize and guide staff training, service planning, and service testing and evaluation. This committee was composed of one representative from each system in the region. Meetings of the committee were held throughout the project with the director of

the National Office to plan and evaluate the team training approach, to design services and to develop a campaign for publicizing services.

The training teams in the metropolitan region were composed of a team leader, usually some one with experience in adult services, and four or five representatives from the library system. In the consolidated systems, team members were selected on such criteria as experience and position within the system; in cooperative systems, team membership was essentially on a voluntary basis. The organization of teams for accomplishing training transfer to library staff took four forms (see Figure 3). In the first type of organization the team functioned as a whole with individual members making presentations at each of the transfer training sessions. Here it was felt that the varying experiences and perspectives of team members would provide valuable contributions in all training topic areas. Three systems chose this organizational structure. In the second type of organization the team leaders conducted training for high level staff while team members conducted training at lower staff levels; in one branch the team co-leader and one team member were responsible for training. This structure was used by one library system. The responsibility for staff training was taken by the team leader in the third type of team organization with team members participating in discussions and exercises: outside speakers were used to cover selected topic areas. One library system used this approach. In the fourth type of organization, three two-person teams were formed (one including the team leader) and each was given responsibility for conducting training within one geographical section of the system. This structure was chosen by one library system.

The library systems have offered two types of training: orientation to the program and training in the four areas covered by consultants from the National Office. Participants in the training have differed from one system to another. The consolidated systems, having centralized control, were able to specify training participants. In these systems, initial transfer training

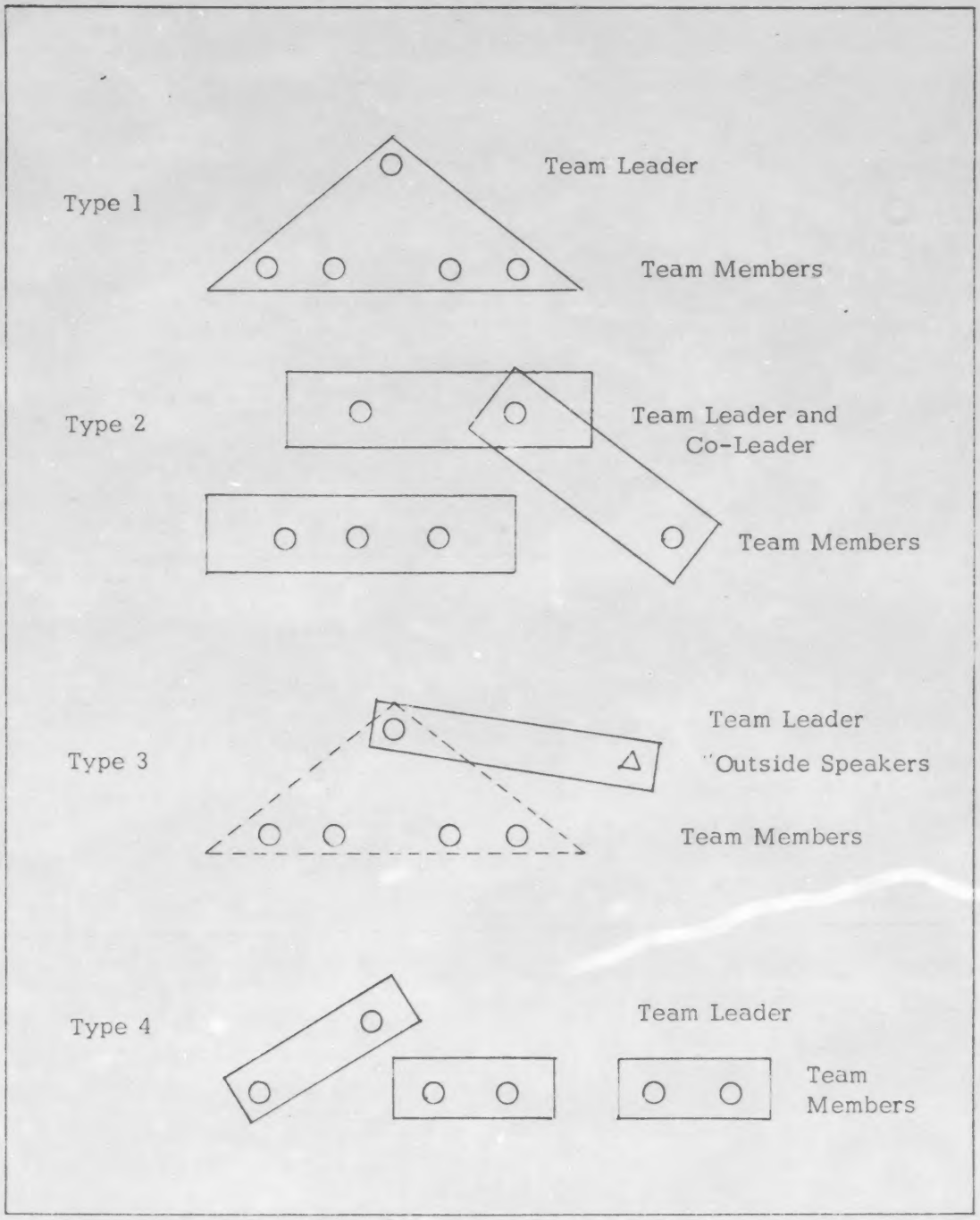


Figure 3. Alternative Team Organizations for Transfer Training*

*Analysis by Ellen C. Clark.

was conducted with selected groups who in turn would provide training to other staff members. The cooperative systems opened their sessions to any staff member desiring to attend.

Overall the teams received a positive response from library directors and staff. Participants have been enthusiastic about the material presented and have indicated their recognition of a service need in this area.

C. SERVICE ACTIVITIES

In March of 1975 representatives from library systems in the New York Metropolitan Region attended a two-day workshop on program planning and evaluation. Workshop presentations of stages in program planning were made by a National Office consultant and by representatives from three of the nine individual libraries participating in the National Program. Particular emphasis was placed on the experiences of the individual libraries as they worked through the planning process. Additionally, a presentation was made on the data collection forms included in the common data collection and evaluation system.

Following the workshop, New York Public Library, Queens Borough Public Library and Brooklyn Public Library developed service plans based on the program planning and evaluation model. All three systems initiated services testing activities during the fall of 1975 and are making use of the common data collection and evaluation system developed from the experience and work of the nine individual libraries participating in the National Program.

VI. SERVICE TESTING AND EVALUATION IN THE INDIVIDUAL LIBRARIES

Preparation for service testing in each library involved two tasks: the development of an implementable service plan and the development of a data collection system for evaluating services offered during the test period. The service plans specified locations, procedures and personnel for providing advisory and information support services to adult independent learners. The evaluation plans included forms and procedures for recording needed information about the learner, the service and the judged usefulness of the service. These forms and procedures were designed to serve two functions: provide a record for the advisor of work with specific learners and provide data for management decisions about service modification and expansion.

During the fall of 1974 and the spring of 1975 nine libraries conducted service testing programs. These libraries were:

- Atlanta Public Library, Atlanta, Georgia
- Denver Public Library, Denver, Colorado
- Enoch Pratt Public Library, Baltimore, Maryland
- Miami-Dade Public Library, Miami, Florida
- Portland Public Library, Portland, Maine
- Salt Lake City, Public Library, Salt Lake City, Utah
- St. Louis Public Library, St. Louis, Missouri
- Tulsa City County Library, Tulsa, Oklahoma
- Free Public Library of Woodbridge, Woodbridge, New Jersey.

A. PURPOSE OF SERVICE TESTING

The service testing phase of the program had three purposes. The first purpose involved examining the feasibility of offering advisory and information support services to adult independent learners through the public library.

Some specific areas of concern regarding feasibility were:

- Will a sufficient number of adult independent learners be identified to justify incorporating the service into the library?
- Will librarians have sufficient background and training to work with learners in diagnosing learning needs, in developing individually tailored learning plans, and in selecting appropriate resources?
- Will librarians feel that the services they are providing are appropriate for the library and useful for the learner?
- Will learners feel that services have been helpful to them in working through their learning projects?

The second purpose of the service tests was to examine the effectiveness and efficiency of planned procedures for working with the adult independent learner. The questions relating to this purpose included:

- Are procedures for identifying adult independent learners adequate?
- Do librarians find procedures workable for diagnosing learning needs and designing learning plans?
- Are procedures for obtaining materials from the collection or for contacting community agencies as efficient as possible?
- Can certain service functions be performed by clerical staff while librarian advisors are working on completing other tasks?

Knowledge gained during the service tests through recorded data and through observations provides a firm basis for modifying procedures and personnel assignments to increase the efficiency of operation. The third purpose of the service tests was to examine the data collection systems designed by each library. This examination focused on the following issues:

- Does the data collection system provide the information needed to make policy decisions about the service?
- Does the format of the forms match the process of working with a learner?

- Do the forms provide the advisor and the learner with an adequate working record of the learning project?
- Are the procedures for summarizing the reported data effective?

Answers to these questions form the basis for developing a data collection system which is easy to use and which provides essential descriptive and evaluative information.

B. ORGANIZATION OF SERVICE TESTS

Table 10 presents an overview of service test organization across the nine participating libraries. In this table the service testing period is divided into two phases. The initial testing phase refers to the first efforts of the libraries in offering and evaluating services. This initial work led to many procedural modifications in service delivery and in data collection. The expanded phase includes those service test activities following the initial evaluation. Services provided in the expanded phase were directed toward a wider range of learners and were offered in a larger number of locations in each library system. The function of this phase was to examine the effects of broadening the service base on service quality and on service evaluation procedures. Five of the nine libraries conducted their tests in two phases; one of the libraries began testing with no limitations; three libraries have completed the first phase and will begin expanded testing in the near future.

Five libraries placed restrictions on the intended learner population in the first testing phase. These restrictions included adults with an interest in credit by examination, adults interested in vocational change or advancement and adults with learning projects in science and technology. In some cases potential adult learners were limited for purposes of manageability, in other cases selections were based on an assessment of community need. St. Louis' selection of adults seeking credit resulted from the fact that the

Table 10. Service Test Organization in Individual Libraries

	Atlanta	Baltimore	Denver	Miami	Portland	Salt Lake City	St. Louis	Tulsa	Woodbridge
Starting Date	September 1974	November 1974	October 1974	January 1975	September 1974	October 1974	October 1974	August 1974	November 1974
Length of Test									
• Initial Phase	3 months	6 months	3 months	4 months	5 months	4 months	7 months	4 months	6 months
• Expanded Phase	4 months	--	4 months	--	2 months	3 months	--	5 months	--
Intended Learner Population									
• Initial Phase	Any adult	Adults with college credit interest	Branch: any adult Main: interest in science and engineering	Any adult	Any adult	Any adult	Any adult: focus on credit	Adults with vocational interest	Adults with credit interest
• Expanded Phase	Any adult	--	Any adult	--	Any adult	Any adult	--	Any adult	--
Projected Number of Learners (Initial Phase)	250 one or more contacts	210 more than one contact	519 one or more contacts	150 more than one contacts	60 more than one contacts	18 completed projects	400 more than one one contact	65 more than one one contact	150 more than one contact
Service Locations									
• Initial Phase	Main library central service desk	5 branch libraries	1 branch 1 department (main)	System wide	Main library central service desk	Main library subject departments; 4 branches	System wide	Main library subject departments; 4 branches	system wide
• Expanded Phase	System wide	--	System wide	--	Main library central service desk	System wide	--	System wide	--
Service Personnel									
• Initial Phase	27 advisors (7 from central; 20 from branches)	5 branch librarians	6 librarians	All public service librarians	12-14 librarians working in teams	4 librarians	All public service librarians	17 librarians	All public service librarians
• Expanded Phase	All public service librarians	--	All public service librarians	--	4 librarians	18 librarians	--	All public service librarians	--

library had been chosen as a testing center for the College Level Examination Program. This is the first instance of a testing center being located in a public library. Denver's emphasis on science and technology resulted from a decision to limit service testing to one subject department in the main library; services provided by the selected branch were open to any adult independent learner.

At the beginning of the service testing period there was a great deal of uncertainty about how to define the adult independent learner. Criteria suggested included length of project, number of contacts with the service and amount of individual work by the learner. Eight of the nine libraries defined learners by the number of contacts with the service; the number of learners expected by these libraries during the service test ranged from 60 to 519. Experience gained through working with adults led to a re-definition of the independent learner. The resulting definition was that a learner is any adult who works with an advisor in describing learning needs and in developing a learning plan. This process could require one or several sessions with the advisor.

In the initial phase of testing,service locations were limited by six libraries. Two of these libraries established a central service location in the main library. This service desk was staffed by librarians from the main library and the branches. Other oganizations included subject departments in the main library, selected branch libraries, one main library subject department and one branch, and all main library subject departments and selected branch libraries. In the expanded phase four of these six libraries set up services in the main library and in all branches. One library decided to maintain a central service location and staff it with the number of advisors needed to meet the apparent demand for service. The other library has not begun the expanded service test phase. The number of librarians serving as advisors in the initial phase ranged from five branch librarians to all

public service librarians. In the expanded service phase three libraries increased advisory staff to include all public service librarians, one library tripled the number of advisors and one reduced the number based on advisor interest and service demand level.

C. PROMOTION OF SERVICE TESTS

During the spring of 1974 the National Office worked with communication consultants and representatives from participating libraries to develop a plan for publicizing the libraries' service to adult independent learners. Specific emphasis in the development of campaign materials was placed on attracting the adult to the public library for purposes of planning and conducting a learning project. The structure of the campaign was designed around five elements, all selected to achieve this objective. The elements were:

- Giving the library's new service a strong announcement.
- Showing the broad scope of learning opportunities available through the library.
- Creating a new image for the library as an exciting place for adults tc pursue learning needs.
- Establishing the fact that self-discovery leads to realization of full potential
- Assuring the adult that the library's service can overcome negative experience with formal learning institutions.

The format of the campaign was multi-media. A television commercial was designed, radio spots were created, newspaper advertisements were composed and in-library displays and brochures were developed. Additionally, a public relations kit was created. This kit included an editorial, a fact sheet about the project, television and radio line announcements, an interview format, and buttons to be worn by librarians providing service.

Eight libraries developed publicity materials of their own to supplement the nationally designed materials. In several cases these local efforts

were quite extensive. Libraries that limited their services to specific categories of adults found that the national publicity was too general to meet their need so promotional materials directed towards their specific service were developed. Additionally, local publicity was designed to provide a simplified explanation of the service. This took the form of brochures and bookmarks listing the major things the service could do for an independent adult learner.

A variety of media were used in promoting service during the testing period. Radio and television spots developed by the National Office were used by most libraries. Generally, however, these media were not used extensively. This was due to two factors: First, libraries were afraid of attracting too many learners at the beginning of the service test; second, spots were hard to schedule and sometimes costly. Newspaper coverage was provided for all libraries. Some of this coverage was by way of the nationally designed advertisement, some resulted from personal interviews with library staff. Posters and brochures (national and local) appeared in all libraries. Salt Lake City was able to further promote its service by enclosing a locally designed brochure in all city paycheck envelopes. Baltimore designed and installed car cards in the city buses. Woodbridge used several different promotional approaches because the national publicity campaign was not appropriate for their needs: their program was more limited; they did not have local radio and television stations in their area. Some of their approaches included designing publicity packets and supplying them to local industry, distributing flyers to local service organizations and preparing short advertisements for churches to include in weekly bulletins. Future promotional plans at Woodbridge include designing shopping bags advertising the service, formally presenting the project to community organizations and developing billboards and posters.

D. DESCRIPTION OF SERVICE

1. Advisory Service

The primary function of the advisory service is the development of a learning plan which matches the needs of the adult independent learner. This plan includes a description of proposed learning activities and the sequence and timing associated with their accomplishment. The creation of a learning plan involves in-depth communication and understanding between the learner and the advisor. This may require one or several working sessions. The most effective learning plan is one which accounts for all the preferences and background experiences of the learner. There are several steps which the advisor and the learner take to reach an effective plan. These steps have evolved out of the work experience of advisors during the service test.

Interviews with advisors at Atlanta, Tulsa and Portland about their work with learners provides the basis for the following procedural description of the advisory service. The first step the advisor takes with a potential adult learner is to describe the advisory and information support services of the library. An essential part of this description is an explanation of the roles the learner and the advisor will play in the accomplishment of a learning project. It is necessary that the learner understand that the advisor's role is to guide and assist; the learner makes the decisions. An important aspect of the initial contact with the learner is making him/her feel comfortable with the advisor and with the processes of the advisory service. The second step involves explaining to the learner the kinds of information the advisor will ask for during the interview; demographic characteristics so the library can determine who they are helping with the service; learning project characteristics so the advisor can develop an understanding of the learner and his/her learning needs. The third step toward learning plan development is to collect demographic information from the learner. A description of the

learner's occupation and his/her level of education may be of use to the advisor in determining strategies for assisting the learner.

The description of learning project characteristics begins with the fourth procedural step. This step involves obtaining a description of the learner's goal. The advisor asks a series of questions to determine why the learner is interested in performing a project: Is it for academic credit, for job advancement, to acquire a skill? The fifth step is to determine what the learner wants to learn; the content scope of the project. If the content is too broad or if the learner is uncertain, the advisor provides assistance in defining the scope. This may be accomplished by outlining a number of alternatives for the learner to consider. Information about the learner's background in the selected content area can be used as a guide in limiting project scope. The sixth step is to describe how the learner prefers to learn. In order to effectively assist in the planning process the advisor must understand the media preferences (e.g.: books, films, small group discussions) and the location preferences (e.g.: library, home, classroom) of the learner. The integration of information on goals, content scope, background experience and learning styles forms the basis for the learning plan. The final step involves working with the learner to select a logical sequence of learning activities to meet his/her learning goals and to satisfy his/her content interests.

Information obtained at each step in the learning plan development process may be modified or elaborated as the learning project continues. Changes in project goals and scope lead to changes in the learning plan. The learning plan, then, is a flexible guide to accomplishing learning goals.

2. Information Support Services

Information support services include selection of library materials, development of study aids and identification of community resources. These services are used to implement the learning plan. Selection of materials usually begins by searching the print and non-print resources of the library.

If appropriate materials are not located then inter-library loan is used or selected purchases are made.

Two approaches have been used in developing study aids to assist the learner in integrating his/her program of learning. In the first approach the advisor creates an individually tailored study aid for the learner through the use of standard bibliographic tools. In the second approach, a group of librarians with expertise in a selected content area work together to develop a study aid for general use. This second approach is used when a common need is identified among learners using the service.

The selection of appropriate community resources is accomplished through the use of community resource referral files. In most of the libraries these files were developed as a result of the service plan. Some referral files were designed around educational opportunities in the community, others contain a broader information base consisting of educational institutions, service organizations, local businesses and individuals. One library has developed a data bank which includes all library and community resources related to adult independent learning. The selection of organizations and individuals to be included in these files has been based on general assessments of learner needs and on requirements identified in specific learning projects. In addition to developing community resource files some libraries have created files containing information of selected library personnel, their areas of content specialization and their willingness to work with learners. The development, maintenance, and updating of all of these files has required substantial time and effort. Two referral procedures have been used by advisors. The first procedure is for the advisor to contact the agency or individual and set up an appointment for the learner. The second procedure is to provide the learner with information on who to contact; the learner takes the responsibility for making the appointment.

An essential element in the provision of support service is evaluation. All materials, study aids and referrals provided by the advisor are evaluated by the learner in terms of usefulness to the learning project. These evaluations occur throughout the conduct of the project. The evaluation process provides direction to the advisor and the learner in the further selection of resources to implement the study plan.

E. DESCRIPTION OF DATA COLLECTION FORMS AND PROCEDURES

A data collection and evaluation system was developed by each library prior to initiating the service test. Guidance in these efforts was provided in two meetings conducted by the National Office during the summer of 1974. In the first meeting a framework for evaluation system design was presented to participating libraries. This framework specified the need for establishing performance targets for the service testing period. The function of the targets was to provide acceptable levels of performance against which service test experience could be measured. The selected target areas were to be used as guides for the design of the data collection systems; essentially the targets specified the questions to be addressed. Participants were also presented with example data collection forms. Following this meeting, each library worked on identifying realistic performance targets and on designing data collection forms. In the forms design work, consideration was given to ease of use as well as completeness of coverage.

The second meeting on the data collection and evaluation systems was conducted in Princeton, New Jersey. The purpose of this meeting was to review each library's plan and to provide suggestions for modification and elaboration. The results of this meeting led to finalization of forms to be used during service testing.

Table 11 presents the performance targets selected by each library. It can be seen from this table that nine target areas were identified across the

Table 11. Performance Targets of the Individual Libraries

Targets	Atlanta	Baltimore	Denver	Miami	Portland	Salt Lake City	St. Louis	Tulsa	Woodbridge
General Satisfaction of Advisors	75%		66%			60%		70%	
General Satisfaction of Learners	75%	65%	68%	95%	65%	75%	85%	70%	80%
Availability of Advisor			70%		75%				
Satisfaction with Learning Plan		75%			75%	85%	75%	80%	
Availability of Materials	60%		59%	80%	75%	75%		80%	75%
Usefulness of Materials	80%	75%				75%	75%	80%	
Usefulness of Referrals	80%	75%			75%	85%		90%	80%
Satisfaction with Facilities	50%			60%	75%				
Achievement of Learning Objective			65%						

the libraries. Four libraries selected advisor satisfaction as an important target during the service testing period. The levels of satisfaction which these libraries hoped to achieve from their advisors ranged from 60% to 75% All nine libraries identified general learner satisfaction as a target; desired levels were between 70% and 95%. Advisor availability was chosen as

a target by two libraries and performance levels of 70% and 75% were specified. For the questions of availability and usefulness of specific services such as learning plans, materials, referrals and facilities, the range of desired performance was from 50% to 85%. None of the libraries identified targets in all of the specific service areas, however, each library chose at least two of these areas.

The data collection forms and procedures designed by each library underwent several alterations during the service testing period. Continued analysis of these systems on the basis of question coverage and ease of use by advisors led to deletion of questions that were providing useless information, addition of questions that needed to be answered and reformatting of forms to facilitate recording of information. In most of the libraries four basic data collection forms emerged: the interview, the progress report, the learner's evaluation and the advisor's evaluation. The interview form included demographic information on the learner, a description of the learning project and an indication of the services provided. This form was used in the initial learner advisor needs analysis — learning plan interview. The progress report form was used at each meeting following the initial interview to record changes in the learning project and services provided. The two evaluation forms provided a means for obtaining service assessments from the learner and the advisor at selected points in the learning project. These forms were initially designed to be used at project completion, however, in many cases they were employed to obtain interim evaluations.

Table 12 presents the data collection categories selected by the libraries. It is interesting to note the high degree of communality in the questions. Eight of the nine libraries asked for some specific demographic information on the learner in terms of age, sex, occupation, education and library use. All libraries collected similar information on the learning project, the styles of learning, the services provided, the usefulness of service and the effectiveness

Table 12. Data Collection Categories Covered by Forms in Each Library

Data Categories	Atlanta	Baltimore	Denver	Miami	Portland	Salt Lake City	St. Louis	Tulsa	Woodbridge
Demographic Characteristics of Learners									
Sex	x			x	x	x		x	x
Occupation	x		x	x	x	x		x	x
Age	x		x	x	x	x	x	x	x
Education	x		x	x	x	x	x	x	x
Library Use	x			x	x	x		x	x
Library Card			x		x	x	x		
Learning Project Characteristics									
Learning Goals	x		*	*	x	*	*	x	x
Areas of Interest	x	x	*	*	x	x	*	x	x
Changes in Project Scope	x				x	x			
Project Length	x	x	x	x	x	x	x	x	x
Learning Style Characteristics									
Media Preference								x	
Type of Contact		x	x		x	x	x	x	x
Number of Contacts	x	x	x	x	x	x	x	x	x
Average Time Between Contacts	x	x	x	x	x	x	x	x	x

x - Information directly available from form.

* - Information may be recorded on form.

Table 12. Data Collection Categories Covered by Forms in Each Library (Continued)

Data Categories	Atlanta	Baltimore	Denver	Miami	Portland	Salt Lake City	St. Louis	Tulsa	Woodbridge
Characteristics of Service									
Services Provided	x	x	x	x	x	x	x	x	x
Number of Referrals	x	x	x	x	x	x	x	x	x
Number of Study Aids	x	x	*	x	x	x	x	x	x
Number of Materials	*	*	*	*	x	x	*	x	x
Service Evaluation									
Comfort with Advisory Service	x	x				x	x	x	x
Availability of Advisor	x				x	x		x	x
Materials Available	x		x		x			x	x
Materials Useful	x	x		*	x	x	x	x	x
Study Aids Useful	x	x		*	x	x	x	x	x
Referrals Useful	x	x		*	x	x	x	x	x
Facilities Appropriate	x				x	x			
Overall Satisfaction	x	x	x	x	x	x	x	x	x
Service Costs									
Personnel Time	x	*	*	*	*	x	*	x	*
Material Cost						x			x
Characteristics of Publicity									
Media Type	x	x	x	x	x	x	x	x	x
Number of Users per Medium	x	x	x	x	x	x	x	x	x

x - Information directly available from form.

* - Information may be recorded on form.

of the communications campaign. The one data collection area which was not commonly selected by the libraries was service cost. This category is composed of personnel time and material costs. Three of the nine libraries designed forms for collecting information on the allocation of advisor time to various service tasks. These forms were completed by advisors when a task was accomplished. Information on the amount of time devoted to service tasks forms the basis for projecting staffing requirements at expanded levels of service. Information on specific material cost was obtained by only two libraries.

The similarities in the forms and the questions developed by the individual libraries led to the creation of a common data system. This system was designed through a series of meetings with library representatives during the spring of 1975. The purpose of the system is to provide participating libraries with a centralized computer analysis of their data. This analysis will allow an examination of relationships among data categories as well as comparisons across libraries. For example, libraries will be able to obtain correlations between demographic characteristics and learning projects or between learning projects and learning styles. These correlations will present a more complete picture of the adult learner, his/her learning needs and his/her preferred style of learning. Profiles can be developed for various categories of learners: for example, learners in a selected age group may be characterized as having different needs and styles than learners in another age group. Additionally, direct comparisons can be made between the advisor's and the learner's evaluation of a specific learning project.

The data categories and forms included in the common system represent an expansion of the data collection systems developed by the individual libraries. The first area of expansion is in information obtained about learning project characteristics and learning styles. New forms have been designed which specifically match the information needs of the advisor in working with

the learner to develop a learning plan. These needs have been described in the section on advisory service. The second area of expansion is in service evaluation. Three additional forms have been created to provide a means for conducting interim assessments of advisory services, materials, and referrals. The third area of expansion is in recording personnel time. An experimental time record form has been designed specifying advisor tasks. These tasks were derived from advisor experience during the service test. The forms included in the common data system are shown in Appendix C.

Operation of the system began in July of 1975. Throughout the following year, the nine participating libraries will receive monthly data reports from the central computer facility. These reports should provide the basis for future decisions concerning the nature and extent of services to the adult independent learner in each library.

F. RESULTS AND DISCUSSION OF SERVICE TESTING

The results of the service testing period will be reported in five areas: the communications campaign, the learner, the learning project, the service, and the advisor time. The data collected on adults using the service are somewhat incomplete in that all adults did not respond to all questions in all areas. This is primarily due to the fact that forms and questions changed as the tests progressed and many adults were not asked some of the questions. Question modification occurred primarily in the areas of demographic characteristics, project descriptions and learning styles. In the service evaluation area most libraries did not request responses from all adults who had contacted the service; selections were made on criteria such as time spent with an advisor, number of contacts with an advisor, or completion of the learning project.

A summary of the data collected by the libraries shows that 1,617 adults contacted the advisory service during the testing period. The number of adults classified as learners ranged from 19 in one library to 480 in another library

with a median number of 151. The wide variation in the number of learners identified in each library is due to two factors. First, the definition of a learner differed from one library to the next and initially many learners advisors were uncertain as to how to distinguish a learner from a regular library patron. In some cases individuals having brief contact with an advisor have been classified as learners, in other cases learners have been defined as individuals who have worked with an advisor to develop a learning plan. Since definitions changed during the service testing period it is impossible to determine how many adults fall into each definitional category. Second, the length of the service test period varied across the libraries from four to nine months.

The data presented in the following sections summarize the results obtained across the nine libraries. The most complete data have been provided by Atlanta, Portland, Salt Lake City, Tulsa and Woodbridge. The number of learners identified by these libraries is 555.

1. The Communications Campaign

Each of the libraries used a multimedia approach to advertising advisory and information support services. Some advertising was accomplished on a broadcast basis through television, radio and newspapers; other promotional efforts occurred in the library. In most cities, the newspaper coverage included articles describing the library's project. An evaluation of the publicity campaign was accomplished through asking adults contacting the service to indicate how they learned of the library's adult independent learning program. In general, this question was asked during the initial interview.

Figure 4 shows the relative effectiveness of each medium in attracting learners to the service. The results reported are based on responses from 1,128 adults. It can be seen from the table that the three most effective media were newspapers, librarians and library displays: together they account for 75% of the adults making use of the service. Radio and television were

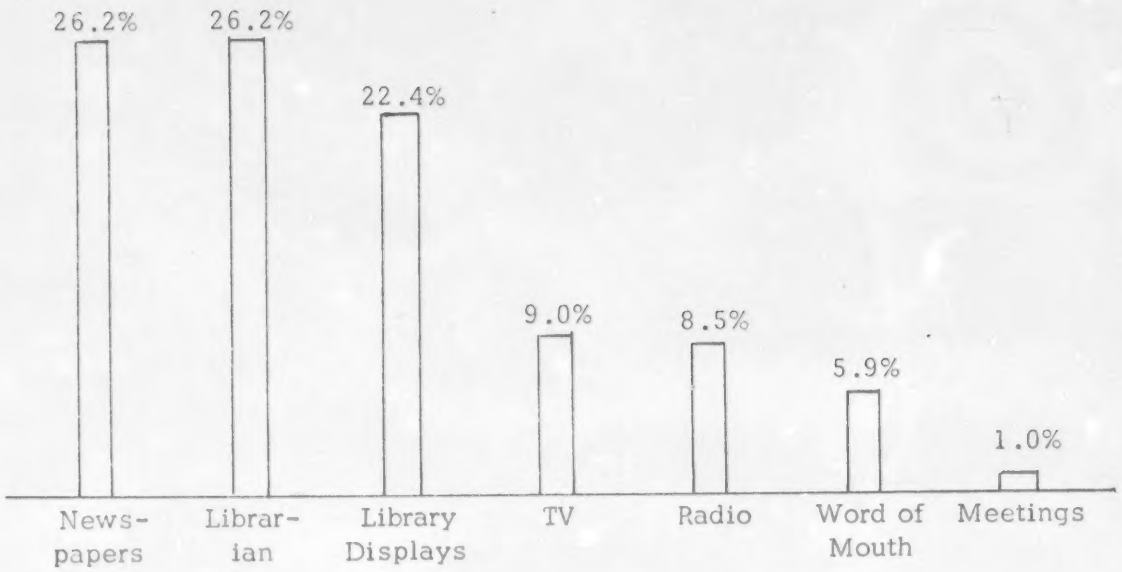


Figure 4. Effectiveness of Promotional Media

responsible for attracting only 17.5%. These results indicate that the libraries should concentrate their future promotional efforts on newspaper articles and on activities inside the library. However, if any of the libraries wish to attract adults from population groups not represented in the service test then new promotional approaches should be explored.

2. The Learners

Eight of the nine libraries collected some demographic information on their learners. The purpose of collecting this information was to develop a general description of the adults using the service in terms of sex, age, occupation and education. Several libraries made comparisons between learners and the general population and between learners and regular library patrons to develop a more complete picture of who was being attracted to the service.

Six of the nine libraries categorized their learners by sex. Of the 574 learners described on this characteristic 41% were males and 59% were females. One library reported that 30% of the learners were male and 70% were female, another had a 50-50 distribution; the other four libraries fell between these extremes. Eight libraries collected age information on 1,042 learners. Figure 5 presents the age distribution of these learners. The learners range from under eighteen to over sixty-five with the largest number, 54.5%,

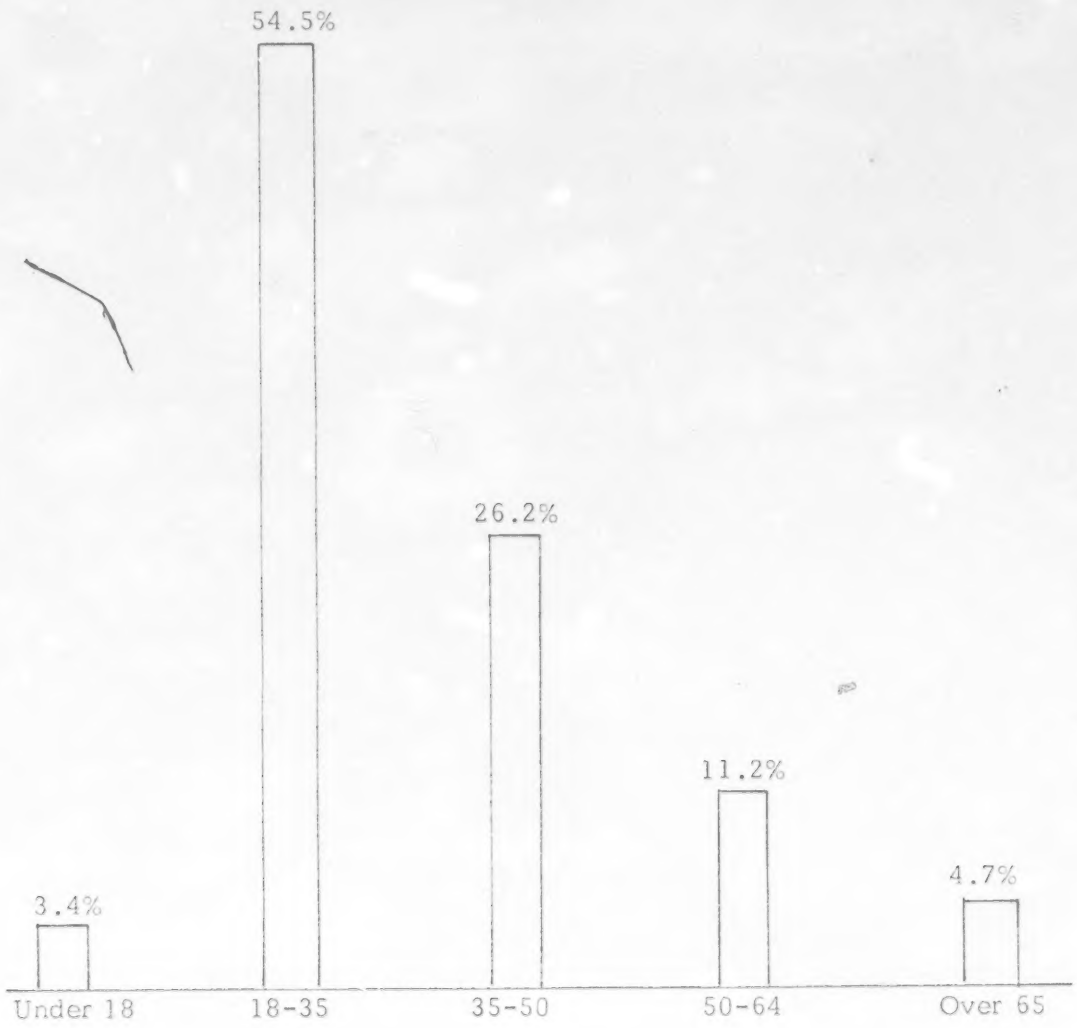


Figure 5. Age Distribution of Learners

reporting ages between 18 and 35. This percentage is higher than in the general adult population figures reported by the libraries. The second largest age category is 35 to 50. These two categories account for 80.7% of the learners.

Information on educational level was collected in six categories from less than high school to graduate work. Eight libraries obtained this information from 906 learners. Figure 6 shows the highest percentage of learners, 31.8%, with some college education. In two cities, Woodbridge and St. Louis, the largest number of learners were high school graduates. This may be due to the fact that these libraries directed their services to learners interested in credit by examination while the six other libraries offered services to all adults. Baltimore did not report data in this category.

Learner occupation was described by six libraries. Figure 7 shows the occupational distribution. Of the 690 learners indicating occupation, 53% were employed. Within the employed category 35.4% held blue collar jobs, 29.7%

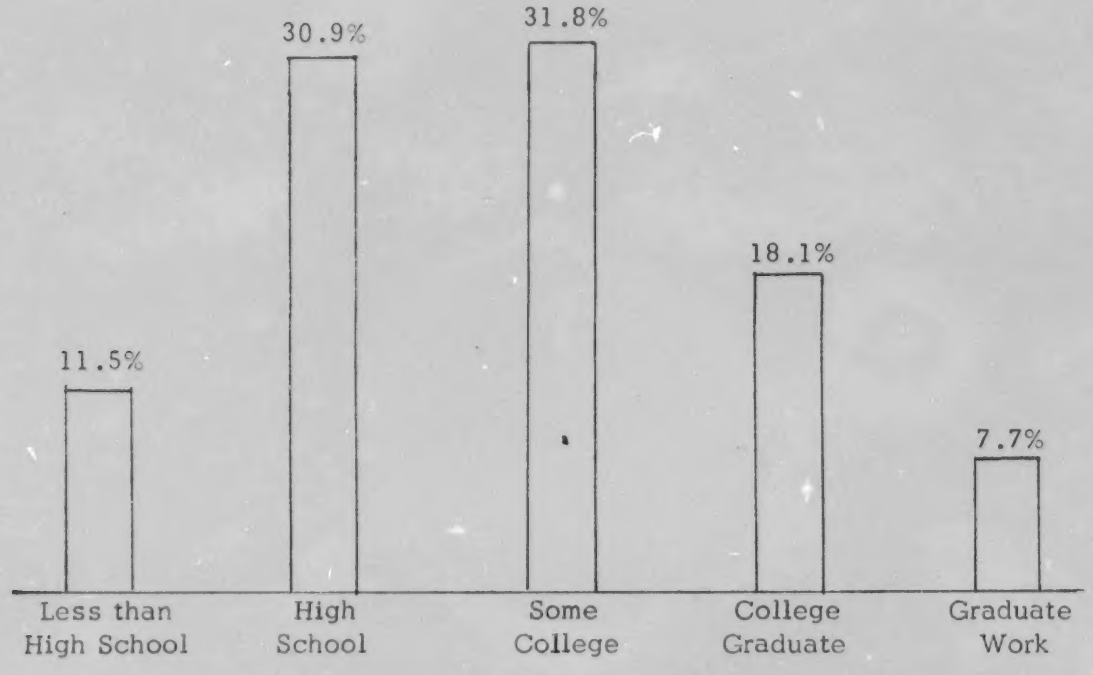


Figure 6. Educational Distribution of Learners

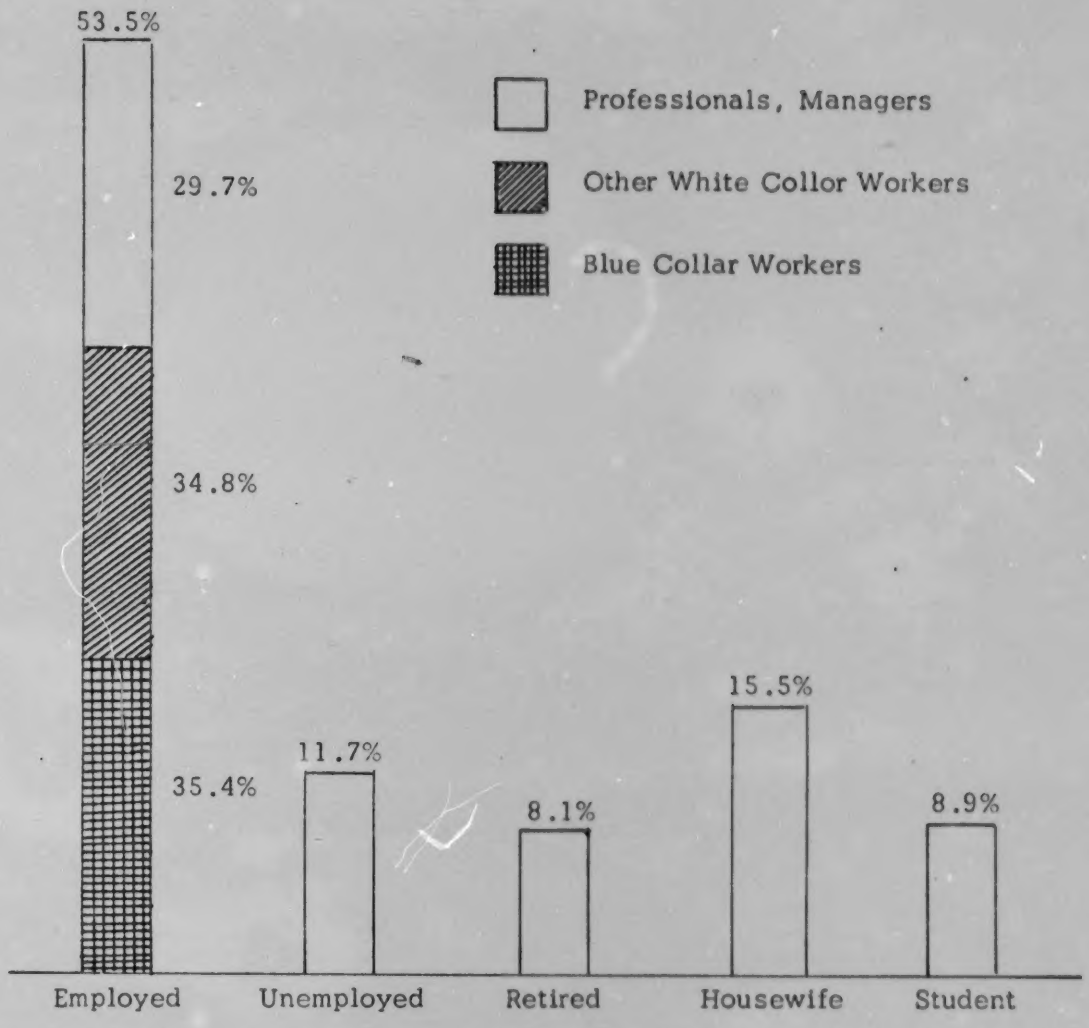


Figure 7. Occupational Distribution of Learners

were professionals and managers, and 34.8% worked in other white collar positions. The percentage of unemployed learners was 11.7%. Comparisons made by three libraries with the population in their area indicated a higher percentage of learners were unemployed. The percentage of retired learners was 8.1% across libraries; in one library 15% were retired.

In summary the Learner's Advisory Service is attracting more females than males with the largest percentage falling in the 18-35 age range. Most of

these learners have acquired a high school diploma or have taken some courses for college credit. Additionally, the service appears to be attracting a higher percentage of unemployed and retired individuals than are represented in the populations surrounding the libraries. Seven of the libraries further characterized learners by their amount of previous library use. This characterization resulted in the finding that 23.2% of the learners have never used the library or have used it less frequently than once a year.

3. The Learning Projects

The learning projects were described in terms of learning goals, content area of interest, average length, and type and number of learner advisor contacts. Information on learning goals was obtained by five libraries. The general goal categories identified by the libraries were: Job Advancement/Change, Academic Credit, and General Education/Personal Development. Of the 604 learners describing learning goals, the largest number (42.7%) was interested in personal development; academic credit was sought by 36.9% of the learners while 20.4% were pursuing job related goals. The high percentage of individuals interested in academic credit results from the fact that two of the libraries focused their service efforts in this area. The goal category of personal development is too broad to provide much information about the learner. Work during the next year will be directed toward dividing this category into specific goal areas.

Learners' interests covered a broad range of content areas. Some examples include architecture, creative writing, foreign languages, film making, boat building, home improvement, woodcrafts, computer technology, and salesmanship. In order to provide a general picture of the distribution of content interests, four libraries classified 488 learning projects according to the Dewey Decimal System. Table 13 shows the results of this classification. Approximately 40.9% of the projects are classified in humanities related categories with the greatest number occurring in Language, Fine Arts

Table 13. Distribution of Learning Projects in the Dewey Decimal System

Dewey Classification	Number	%
General Works (000)	17	3.5
Philosophy (100)	18	3.5
Religion (200)	8	1.6
Social Science (300)	107	21.9
Language (400)	63	12.9
Pure Science (500)	28	5.7
Applied Science (600)	139	28.4
Fine Arts (700)	49	10.0
Literature (800)	45	9.2
History and Bibliography (900)	14	2.9
Total	488	100.0

and Literature. The Applied Sciences account for 28.4% of the learning projects while 21.9% are in the Social Science area. Both Atlanta and Salt Lake City reported slightly more learning projects in Language and Fine Arts than in the Social Sciences while Portland reported slightly fewer. Tulsa reported the largest number of learners, 35%, in the Social Sciences. Many of these learners were interested in taking the general examination for a high school diploma. Table 14 provides examples of specific learning projects in the Humanities, the Social Sciences and the Applied Sciences.

Contacts with the learners advisory service were made in person or by telephone. Most learners, 79%, came to the library to talk with advisors about their projects while 21% made inquiries about services by telephone. This relatively high percentage of telephone usage is accounted for by two libraries, Baltimore and St. Louis, who were distributing information on the

Table 14. A Sample of Specific Learning Projects

Humanities (Including Fine Arts)	Science and Technology (Applied and Pure)	Social Science
Abstract Reasoning	Accounting	Brokerage Management
American Literature	Advertising	Business
Arabic	Astronomy	Business Law
Architecture	Auto Repair	Business Management
Art	Chemistry	Careers
Calligraphy	Clock Repair	Civil Rights
Chess	Conservation	Communications Skills
Classics	Contracting and Construction	Economics
Creative Writing	Dictation, Shorthand	Education
Dance	Driver Education	Folk Lore
Design	Engineering	Foreign Service Exam
Drawing	Home Remodeling	Importing
English	Horticulture	Insurance
Fashion Design	Mathematics	Investments
Film Making	Mechanical Drawing	Law, Pre-Law
French	Medical Technology	Local Political Issues
Geography	Motels and Restaurant Management	Personal Finance
German	Nursing	Psychology
Guitar	Nutritional Planning	Reading
History	Ornithology	Socialism
Humanities	Physical Therapy	Social Work
Journalism	Piano Repair	Sociology of Sports
Music Appreciation	Plumbing	Stock Market
Painting	Public Relations	Transactional Analysis
Philosophy	Ranching	Vocational Guidance
Photography	Real Estate	
Piano	Refrigeration	
Poetry Appreciation	Sales	
Printmaking	Termite Control	
Religion	Transportation	
Singing	Upholstery	
Spanish	Veterinary Medicine	
Violin	Weaponry	
World Literature	Well Drilling	
Writing for Children Poetry, Short Stories, Television	Wine Making	

College Level Examination Program. In St. Louis over 50% of the learners made contact by telephone. In the remaining libraries, 93% of the learner contacts were made in person. The number of contacts made by learners ranged from 1 to 16, with 54% working with an advisor more than once. Three libraries reported on the average time between learner advisor contacts; their results showed a time lapse of two to three weeks with a range of less than one week to more than four months. If these figures are representative across libraries then many of the one-visit learners may return for additional help. Across all libraries only a very small percentage of learning projects have been completed. Apparently the service testing period was not long enough to collect data on questions of project length or the average number of contacts required to complete a learning project.

4. The Services

Advisory and information support services were provided to learners throughout the testing period. The evaluation of these services by both learners and advisors is presented in Table 15. The first two columns in this table indicate the number of learners asked to evaluate each service and the percentage of learners that responded. Different criteria were imposed by each library in determining who should be asked to evaluate the service. One library chose learners who had completed projects, other selections were based on number of contacts, length of contact and amount of independent work on the part of the learner. The variation in the number of learners asked each evaluative question results from the fact that the libraries focused their evaluations in different service areas. The percentage of learners evaluating each service range from 42% for appropriateness of library facilities to 63% for material availability. The number of advisor responses across service categories is between 59 for advisors availability and 267 for material usefulness. As with the learners, advisors were asked different questions in each library. Three methods were used for obtaining learner evaluations. These methods included giving the learner an evaluation form on one of his/her

Table 15. Service Evaluation

Evaluate Category	Learners			Advisors	
	No. Asked	% Responses	Evaluation	No. Asked	Evaluation
Overall Satisfaction	668	58%		204	
Satisfied			88.3%		67.0%
Unsure			9.3%		18.8%
Not Satisfied			2.4%		14.2%
Comfort	364	54%		224	
Comfortable			93.0%		87.9%
Unsure			6.0%		11.2%
Not Comfortable			1.0%		.9%
Advisor Availability	222	62%		59	
Available			94.1%		77.9%
Unsure			3.7%		3.4%
Not Available			2.2%		18.6%
Material Availability	555	63%		197	
Available			68.5%		61.4%
Unsure			6.3%		13.2%
Not Available			25.2%		25.4%
Material Useful	400	47%		267	
Useful			82.9%		76.0%
Unsure			10.6%		11.6%
Not Useful			6.4%		12.4%
Referrals Useful	172	48%		77	
Useful			79.1%		79.2%
Unsure			11.6%		--
Not Useful			9.3%		20.7%
Facilities Satisfactory	239	42%		--	
Satisfactory			79.0%		
Unsure			14.0%		
Not Satisfactory			7.0%		

visits with the advisor, mailing evaluation forms to selected learners and conducting telephone surveys. All advisors participating in the service test were asked to express their attitudes about the value and usefulness of services provided. In some libraries advisors filled out separate evaluation forms for each learning project, in other libraries advisors completed one form for all projects supported.

Most of the libraries used either a five or a seven point scale to obtain evaluations of service; these scales ranged from very useful to not useful. For purposes of analysis, the responses on the high end of scales (first two or three categories) were considered positive, middle responses were classified as unsure, and low responses were considered as negative. Based on this analysis, 88.3% of the learners evaluating their overall experiences with the services, indicated satisfaction, while only 67% of the advisors said they were satisfied. The range of learner responses across libraries was 72.6% to 100%, for advisors the range was 57.0% to 70.0%. The discrepancy between learners and advisors on this question may be due to the fact that advisors had higher expectations for the service. All advisors had gone through some training concerning the service and many had been involved in service planning. Learners, on the other hand, had been given no previous orientation to the service and probably had little idea of what to expect. When learners were asked if they would use the service again 97.5% reported that they would. Additionally, 96.8% said they would recommend the service to a friend.

Two questions were asked of learners and advisors concerning the advisory service. The first question was concerned with the degree of comfort in the working relationship. The second question dealt with availability of the advisor to meet with the learner when necessary. In response to the first question 93% of the learners and 88% of the advisors indicated that they were comfortable; the range of responses across libraries was 79%–97% for

learners and 83%—93% for advisors. Regarding advisor availability, 94% of the learners felt that they were able to meet with their advisor when needed while 78% of the advisors felt positively about their availability to the learners. Here again, differences in judgment between the two groups can be accounted for by higher expectations on the part of advisors. Many advisors have commented on the difficulties of scheduling time to meet all commitments.

Information support services were evaluated in four categories: Material Availability, Material Usefulness, Referral Usefulness and Appropriateness of Library Facilities. The greatest satisfaction indicated in these service areas was with the usefulness of materials; 83% of the learners and 76% of the advisors judged the provided materials as useful to the learner in working through his/her learning project. A comparison across the libraries shows learner responses varying from 58% to 98%. Those libraries obtaining lower evaluations for material usefulness should re-examine their procedures for matching materials with learning needs. The least satisfaction with the information support services was found for material availability. Only 68% of the learners and 61% of the advisors indicated that appropriate materials were available. The range on this question was 58%—78% for learners and 52%—68% for advisors. Denver received the highest evaluation on material availability. This results from the fact that Denver has developed a variety of programs aimed at the organization of library resources for adults in the community. The generally low evaluations in this area, however, suggest that acquisition criteria should be reassessed in terms of the needs identified through work with adult learners.

5. The Allocation of Advisor Time

In three of the libraries, Atlanta, Salt Lake City and Tulsa, advisors were asked to keep records of time spent on various aspects of service provision to learners. Each time an advisor did some work for a learner, the time associated with that work was recorded on a time sheet. A classification of advisor tasks is shown in Table 16. These tasks include interviewing the

Table 16. Allocation of Advisor Time

Tasks	Atlanta	Salt Lake City	Tulsa
Interviewing	21 min per interview	27 min per interview	28 min per interview
Background Reading and Planning		42 min per learner	
Locating and Evaluating Materials	53 min per learner	1 hr 54 min per learner	45 min per learner
Making Referrals	20 min per referral	45 min per referral	
Developing Study Aids	1 hr per reading list	5 hrs per study guide	3 hr 50 min per study guide
Completing Data Forms	10 min per learner	36 min per learner	
Clerical Work	5 min per learner	56 min per learner	

learner, background reading and learning plan development in selected content areas, locating and evaluating materials, developing study aids to assist the learner in his/her project, completing data forms and performing clerical work such as typing, filing and xeroxing.

The time spent by advisors in interviewing learners either in the first visit or in progress visits ranged from an average of 21 minutes per interview in Atlanta to 28 minutes in Tulsa. Data collected by other libraries showed interviewing time was between 20 and 30 minutes. As can be seen from the table, advisors in Salt Lake City spent significantly more time on information support and clerical tasks than advisors from the other two libraries. Tulsa

advisors combined locating and evaluating materials and making referrals into one time category. The average time spent by these advisors was 45 minutes per learner. Advisors in Salt Lake City and Atlanta kept separate time records for these two tasks. Data from Salt Lake indicate an average of 1 hour and 54 minutes per learner for locating and evaluating materials while Atlanta's advisors spent an average of 53 minutes per learner on this task. Salt Lake City made eight referrals with an average time of 45 minutes per referral, Atlanta made 45 referrals with an average time of 20 minutes per referral. With regard to study aid development, Salt Lake City created 31 study guides at an average time requirement of 5 hours per guide, Tulsa created 20 study guides at an average of 3 hours and 50 minutes per guide, Atlanta created 35 reading lists at an average of 1 hour per list. The difference in preparation time for study guides and reading lists is due to the fact that study guides provide content descriptions and a plan for approaching recommended reading whereas a reading list only includes a list of recommended sources.

The time involved in completing data forms on the learning projects was recorded by advisors in Atlanta and Salt Lake City; these times were 10 minutes per learner and 36 minutes per learner, respectively. Although these times are significantly different, they proportionately represent 8% of the advisors' time in each library when viewed in terms of the time spent on other tasks. The clerical time (filing, typing, xeroxing) was 5 minutes per learner in Atlanta and 56 minutes per learner in Salt Lake City. These figures indicate that the clerical work was easily handled by advisors in Atlanta while in Salt Lake City some consideration should be given to providing advisors with clerical support.

The higher time figures reported by Salt Lake City across all tasks may result from one of the following factors. First, advisors in Salt Lake City may be providing a more in-depth service than is being offered in the other two libraries. Second, the service procedures used in Salt Lake City may differ from

those used in Tulsa and Atlanta. Third, advisors in the three libraries may be using different definitions for time spent on learning projects. These are areas which require further examination during the next year. Throughout this time period it is expected that all nine libraries will make use of advisor time records. Data from these records should provide a stronger basis for describing the amount of time in terms of averages and ranges associated with performing learner advisor tasks. This information will be useful to the individual libraries in making personnel projections for planned levels of service as well as to other libraries interested in intiating services to adult learners in their communities.

G. ASSESSMENT OF SERVICE TESTS

The service testing program in the nine libraries had three purposes: to test the feasibility of the service concept, to assess planned procedures and develop new procedures for efficient and effective service delivery, and to examine the data collection systems in terms of ease of use and relevancy of information to advisors and to policy decision makers. All of these purposes have been accomplished. Feasibility of the service concept has been demonstrated in that a substantial number of adult learners have been attracted to the program and the services provided have been judged as useful by both learners and advisors. Overall, 1,617 learners contacted the service during the service testing period. Of those learners who evaluated the service, 88% expressed satisfaction, the advisors' assessments indicated that 67% were satisfied and 18.8% were unsure about service effectiveness. These data show that the service is needed and that it is generally perceived by learners and advisors as being worthwhile.

Throughout the service tests, procedures were examined, modified and elaborated. Experience gained through practice led to alterations in how services were set up and in the scheduling of personnel to provide these

services. Many of the libraries initially felt that advisory desks should be staffed during all hours of library operation. In these situations, much time was wasted while advisors waited for learners to appear. Data collected on the frequency of learners and on the times learners chose to contact the service led to modifications in advisor schedules. For example, in one library, 65% of the learners used the service between noon and six in the evening with 87% using the service between nine in the morning and six in the evening. This finding resulted in lighter staffing arrangements for the evening hours. The most critical area of procedural modifcation and elaboration during the testing period was the interactive process between the advisor and the learner in working toward a focused, individually tailored learning plan. At the beginning of the service tests, most advisors were given a general set of procedures for working with learners. These procedures became more and more specific as advisors began discussing learning goals, learning project content areas and alternative approaches to the learning experience with actual learners. In some cases advisors found specific aspects of the advisory service more difficult then they had expected. Identification of these problems led to the development of training programs to help advisors gain both competence and confidence in areas of weakness. With regard to the information support services, procedures have been streamlined for obtaining resources within the library system and for making referrals to community agencies. Here again, advisors found areas in which additional information was needed in order to provide efficient service. These information needs led to sessions designed to familiarize advisors with both library and community resources.

Finally, the data collection and evaluation systems initially designed by each library have undergone several changes as a function of experience gained during the service testing period. Specific forms have been redesigned to better fit the steps taken by the advisor and the learner. Additionally, questions have been eliminated, reworded, and added based on analysis of

how the resulting information would be used by advisors in working with the learner and by policy decision makers in determining the nature of the service in the future. The end result of the libraries' efforts has been the development of a common data collection and evaluation system to be used by all the libraries during the next year. Summarization and analysis of data provided through this common system will be accomplished by a centralized computer facility. Programs developed specifically for this system will allow libraries to examine relationships between learner characteristics (age, sex, education, etc.) and between learner characteristics and learning project characteristics (learning goals, learning content areas, learning method, etc.). The results will provide the libraries with a more complete description of the adult learner, his/her project(s) and the advisory and information support services then has been available through the manual data analysis systems used during service testing. This elaborated description will serve as an input to advisors and to policy decision makers. The following year will be devoted to examining the effectiveness of the common system in providing needed information. An important aspect of this effort will be the translation of results into summary reports for advisors, planners and policy makers. Effort will be directed toward identifying the information content and the format structure of reports for these different groups within the library.

VII. A CLOSER LOOK AT FIVE LIBRARIES: SOME CASE STUDIES

Each of the nine libraries submitted reports to the National Office describing service planning, staff training and service testing efforts. The material covered in five of these reports is presented in this section to provide the reader with a clearer understanding of project development and implementation in the libraries. A more detailed example, representative of the thinking and work accomplished in several of the participating libraries, is given in the first case study covering the Atlanta Public Library.

In presenting the five case studies every effort is made to represent, objectively, the findings of the libraries as presented in their final project reports. The authors* have judiciously tried to avoid unnecessary editorializing.

Two essential observations emerge from the experiences of these five public libraries. First, the overall honesty with which the libraries individually tackled the task of reporting on a complex and highly innovative three-year effort. Clearly, they make no attempt to "wash away" the problems which existed. At the same time, though, they leave no doubt that their experience was both exciting and professionally rewarding.

Second, and most important, these reports represent a pioneering effort and contribution to the profession, one which has no parallel counterpart. These public libraries have engaged in a systematic process of planning, implementing and evaluating an on-going service innovation. The effort has provided substantive management changes, offered extensive staff development opportunities and has created positive changes in staff attitudes towards library service. All of these internal changes have

*Alan R. Samuels, who assisted in the preparation of this section, is a doctoral student at the Graduate School of Library Service, Rutgers University.

taken place while the librarians were providing in-depth personalized service to hundreds of adults, some 30 percent of whom had never used the public library previously.

The experience clearly demonstrates that innovative service geared to meet real needs defies "quicky solutions." Trial and error over time, with patience and the ability to tolerate some ambiguity, are the necessary ingredients for the successful provision of innovative service.

These public libraries undertook risks which the "experts" claimed would not be possible. The library leadership accepted the necessity to systematically plan a service by first conducting a needs assessment of their community. They accepted the necessity to "test" their thinking before full-scale implementation of the service by conducting four to eight month pilot projects. And, they accepted the necessity to initiate an on-going data collection system geared to stated objectives for feedback to both management and on-line librarians. They recognized that, while at times painful and annoying, such information was essential to improved service, a necessity for professionally responsible behavior. They accepted all of these "risks" through the arduous process of local determination, a process guaranteed to produce delay, frustration and dissent, but one clearly in keeping with the basic philosophy of the public library as a key institution in the democratic process.

In a period during which the mettle of public libraries is being continually tested by those responsible for allocating scarce resources, it has become increasingly necessary for libraries to demonstrate their willingness and ability to provide the best kind of service to a diversity of clients. Traditionally, libraries in our society have had the responsibility to act as a repository of knowledge, of culture, and of recreational materials. However, given the varied information needs of people, this warehouse function has not proved enough. The support of adult independent

learners, while consistent with the traditional mission of service to individuals, is an innovative and outgoing type of service, not one which is solely reactive in nature. As one participant library has eloquently defined the concept:

> The concept of adult independent learning encompasses a number of new ideas about the informational and educational needs of the community. Predominant among these ideas is that learning does not stop with formal schooling. In one way or another, all of us are continually embarking upon learning projects. We learn for career advancement, academic credit, self-fulfillment and just plain relaxation and fun. We are all learners throughout our lives. The Adult Independent Learning Project has been an effort to explore ways in which the public library might serve to facilitate and encourage these continuing learning efforts.*

This section of the summary report is designed to discuss the experiences of five libraries which chose to become a part of this project and which contributed much of their time and wealth to the project's success. Study of the experiences of these libraries not only reveals much about their concepts of library service, but also illuminates the problems of libraries in general relating to such diverse subjects as internal managerial styles and continuing education among librarians.

During the fall of 1973 and the spring of 1974, participating libraries developed full-scale service plans for implementing adult independent learning projects. Pilot tests of these plans were initiated, in some

---

*Portland Public Library, Portland, Maine, "Adult Independent Learning Project. Summary Report. June 1973-June 1975. Preliminary Draft," p. 1.

cases to be followed by expansion of pilot tests into full service, in other cases to be followed by redefinition of project plans for final implementation. Much modification, controversy, diversity, and exhilaration, as well as some discouragement, was felt during this period by the libraries. Obviously the project was not going to be easy, and most libraries began to realize this reality at the point of implementation. The National Office participated in these initial stages through the conduct of training sessions for the libraries.

Participating libraries had various subsidiary goals and objectives for engaging in the project. Testing of new (to libraries) managerial styles was important, as well as more concrete goals such as the development of a new central library facility which could incorporate findings of adult independent learning experiences. Of the participating libraries, five supplied the National Office with substantial information. These were Atlanta Public Library, Portland Public Library, Salt Lake City Public Library, Tulsa City-County Public Library, and the Free Public Library of Woodbridge. Each of the draft reports submitted by these libraries differed somewhat in such categories as report emphasis, and category definition. Although common elements pervaded each report, diversity in experience appeared to play a large part in each library's emphasis as revealed by their draft reports.

In the case studies which follow, a deliberate attempt has been made to retain something of the flavor of each library's draft report. A conclusion following the case studies attempts to partially tie together the experiences of learning projects among the libraries. It is of a preliminary nature. Final conclusion must await the processing of new data currently being collected by the libraries.

ATLANTA PUBLIC LIBRARY

A. INTRODUCTION

In April of 1973, the Atlanta Public Library became actively involved with the Office of Library Independent Study and Guidance Projects. Three conditions existed at the Atlanta Public Library that helped pave the way for its involvement with the National Program:

- The top library administration was committed to the idea that a public library could serve as a focal point for innovative education and self-improvement programs; the general concept of unstructured education programs offered to a wide range of patrons to meet a wide range of needs.
- The library had previously been involved in structuring and implementing innovative services to patrons through the Mobile Information Service, Telephone Ready Reference, and the Neighborhood Information Center Project.
- The library staff was interested in experimenting with this new program and was willing to do the additional work required for its operation.

During the summer and early fall of 1973, selected library staff members formed a program planning and evaluation committee to develop a plan for testing and implementing focused service to the adult independent learner. The first part of this plan involved a specification of service goal. This goal was stated as follows:

"The Atlanta Public Library shall serve as the community center for assisting, facilitating and encouraging adult independent learners

in meeting their informational needs in the areas of career awareness and subject or special interest development. This library service is directed toward those persons who want to take part in an unstructured, self-directed learning project."

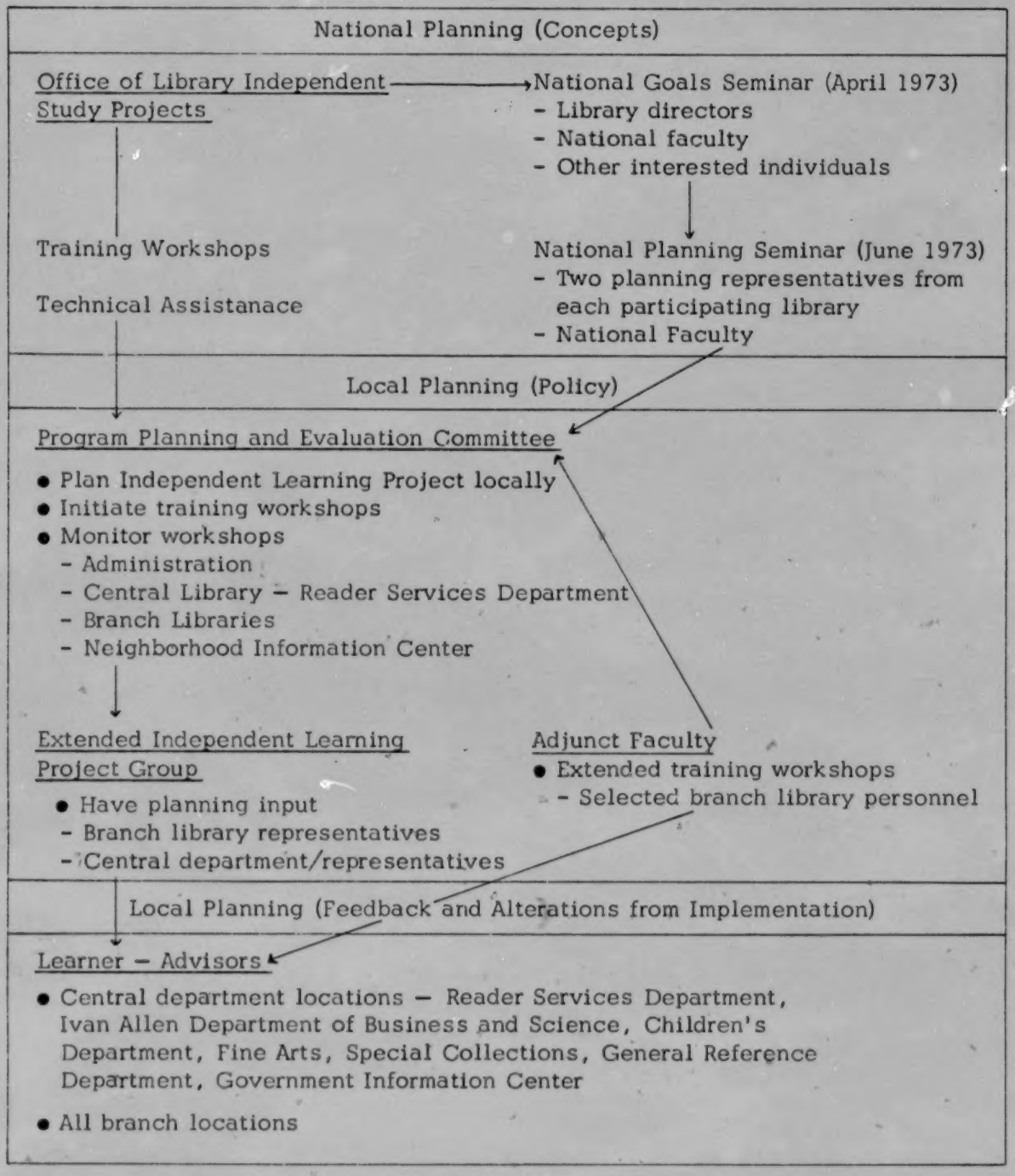
B. PROGRAM COMPONENTS

The independent learning project in Atlanta was structured around five program components: project planning, project management, staff training, publicity and service to learners. Project planning emerged from a background of research and training provided at the national level. Locally, planning was undertaken by a Program Planning and Evaluation Committee and an Extended Project Group. These two groups addressed policy and implementation aspects of the Independent Learning Project; together they formulated a service program attuned to the needs of the Atlanta system. Table 17 illustrates the organization of the project in terms of the planning process. The arrows in this table represent the information flow between planning levels.

Project management, the second project component, was concerned with the efficient monitoring and administration of the testing of planned services. Figure 8 shows the major sources of management input during the initial service test and the expanded service test. The initial service test involved offering service through an independent learning project office established at the central library. Library staff from branches as well as the central library served as learners advisors in this office. The expanded service test involved offering service through the central library and all the branches. The management during both testing phases was characterized by continuous feedback to all staff levels involved. This feedback policy has led to:

- A high staff acceptance of the Independent Learning Project.
- An ability to introduce change into the service without causing disruption.
- A strong possibility that project management practices can be integrated into other library functions.

Table 17. Organization of Independent Learning Project: Atlanta
(Planning Process and Information Flow)


National Planning (Concepts)
Office of Library Independent Study Projects
National Goals Seminar (April 1973)
- Library directors
- National faculty
- Other interested individuals
Training Workshops
Technical Assistanace
National Planning Seminar (June 1973)
- Two planning representatives from each participating library
- National Faculty
Local Planning (Policy)
Program Planning and Evaluation Committee
• Plan Independent Learning Project locally
• Initiate training workshops
• Monitor workshops
- Administration
- Central Library – Reader Services Department
- Branch Libraries
- Neighborhood Information Center
Extended Independent Learning Project Group
• Have planning input
- Branch library representatives
- Central department/representatives
Adjunct Faculty
• Extended training workshops
- Selected branch library personnel
Local Planning (Feedback and Alterations from Implementation)
Learner – Advisors
• Central department locations – Reader Services Department, Ivan Allen Department of Business and Science, Children's Department, Fine Arts, Special Collections, General Reference Department, Government Information Center
• All branch locations

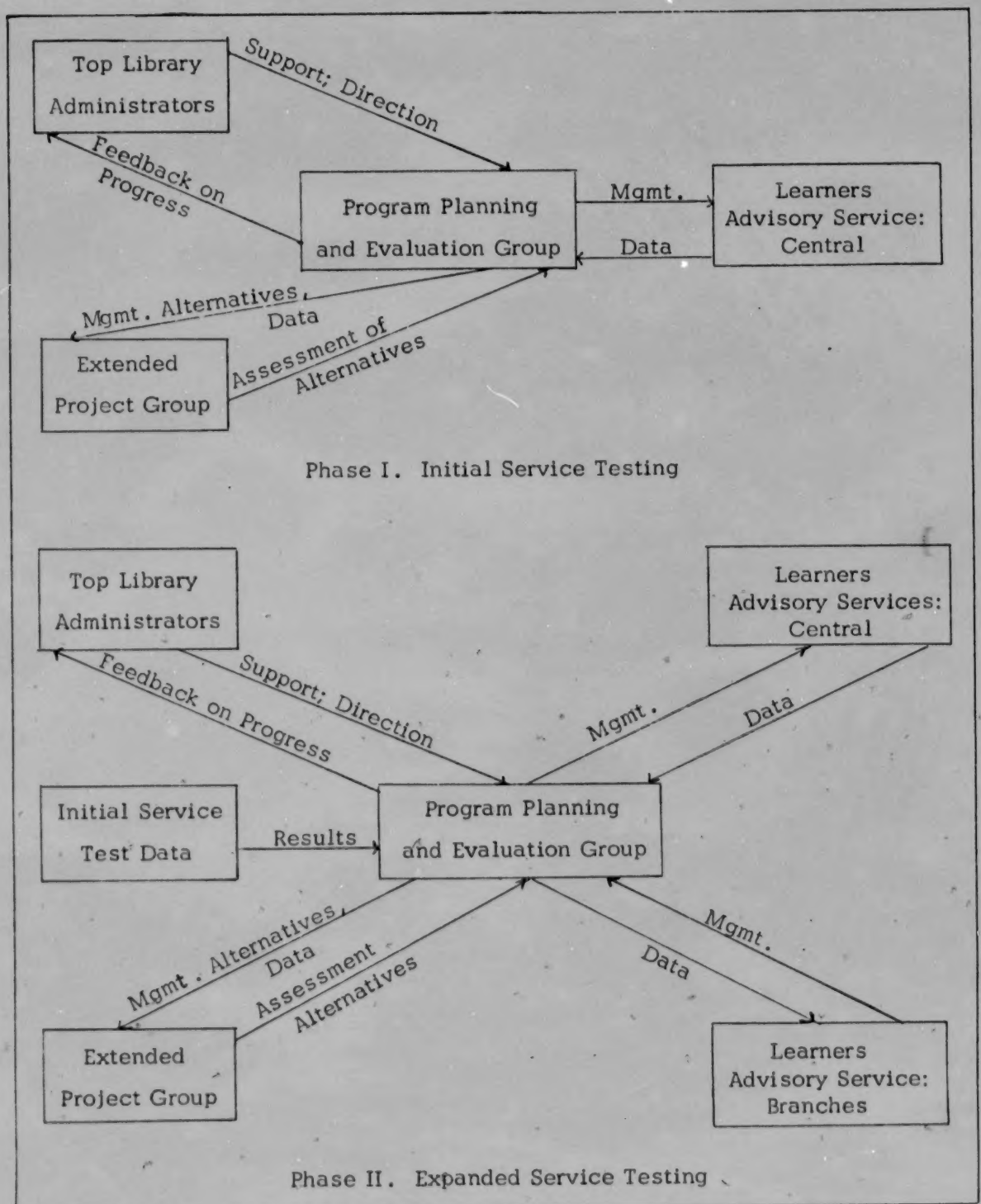


Figure 8. Management of Service Testing: Atlanta

The training component of the project is described in Table 18. This table shows the provision of staff training beginning at the national level and progressing through locally controlled stages. It is anticipated that training will continue and will be directed toward the changing needs of the Independent Learning Project program staff. Any further training will be conducted through the use of both national and local professionals specializing in the areas where training is needed.

The publicity component is illustrated in Figure 9. The publicity campaign was originally directed toward a broad segment of the patron population through the mass media. As the Independent Learning Project moved into the expansion phase a new emphasis was placed on reaching local segments of the population through more direct communication methods.

Figure 10 provides a pictorial overview of the service component. The first two stages shown in this figure involve the potential learner becoming aware of the library's service and contacting the library. The third stage involves in-depth discussions between the learner and a learners advisor focussed on identifying learning goals and on developing a learning plan. The fourth stage includes continuing contact between the learner and the advisor and the provision of information support services specified in the learning plan. The final stages are completion of the learning project and an evaluation of the experience by both the learner and the advisor.

C. RESULTS OF SERVICE TESTING

The project staff, with technical guidance from the National Office, designed an evaluation system which was implemented during the project. The evaluation system was designed to meet the following objectives:

- To establish administrative practices and procedures which would increase probability of success for introducing and managing change.
- To establish, with the data base, a more objective foundation for ordering priorities and allocating resources to the Self Directed Adult Learner program efforts.

Table 18. Flow of Training Information: Atlanta

Pre-Service Test	Initial Testing Phase	Expansion Phase
Step 1 National Seminars A-Goals Seminar (4/73) • Selected Library • Directors • Adult Education Experts B-Planning Seminar (6/73) • Local library representatives • National faculty Step 2 ↓ National training workshops 11/73 - 4/74 (Local ILP workshops conducted by National Advisors A-Introduction to ILP B-Planning & Evaluation Model C-Understanding Adult Learner D-Setting up education plan E-Counseling techniques F-Utilizing learning materials *Note A & B for PP&E Committee, C - F for both Extended Project Group and PP&E Committee Step 3 ↓ Extended ILP Group reported content of seminars to local branch personnel	Step 4 Extended ILP Group rotated through ILP office at Central during pilot, then reported back to branch personnel.	Step 5 Adjunct Faculty - four branch personnel to canvass for additional training needs. Step 6 ↓ Training - Planned by Adjunct Faculty and conducted by local consultants. A-Reading Awareness B-Reference and Bibliography C-Interviewing

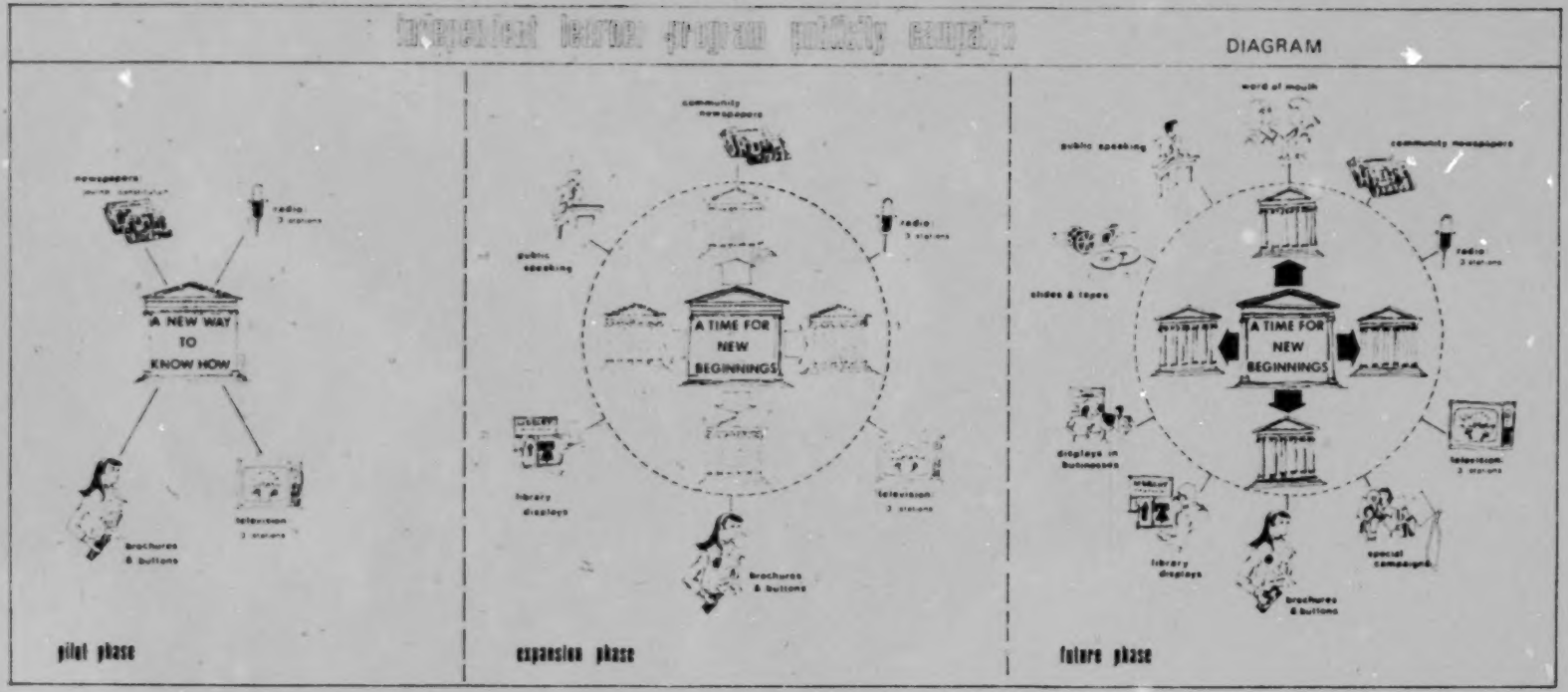


Figure 9. Independent Learner Program Publicity Campaign: Atlanta

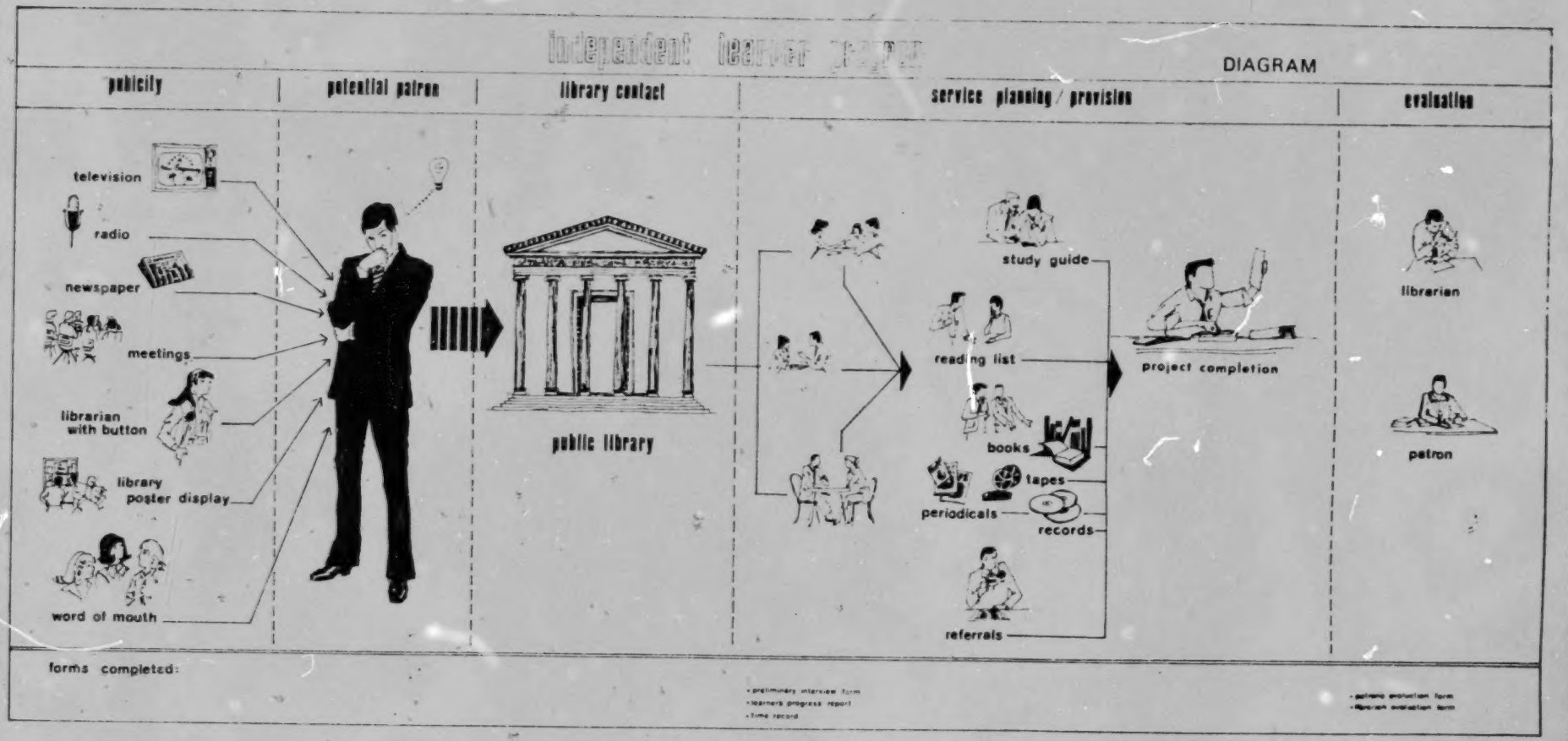


Figure 10. Independent Learner Program: Atlanta

- To establish a communication mechanism for continual feedback within the library, among participating libraries in the National Program, and between the Atlanta Public Library and the National Office.

- To establish an accountability system with an objectives-based information system through a systemized reporting procedure.

- To establish, as part of the "routine" operation, an on-going process whereby the library evaluates its program and service efforts.

The data system represented an attempt by Atlanta to balance the needs of developing a common data base with the need to be realistic within the local environment and meet the library's program management and evaluation requirements.

Data collection ran from September 16, 1974, to December 15, 1974 for the initial service testing phase of the project. December 15, 1974 to February 1, 1975 represents an interim period, during which the initial data were analyzed and appropriate program changes made. February 1, 1975 to May 20, 1975 encompasses the data gathering period for the expansion phase. A total of 132 learners used the services. Approximately the same number participated in the initial and expansion phases. The results of the data analysis are provided in the following five sections: evaluation of communications campaign, description of adult learners, learning project characteristics, service provision and evaluation, and distribution of personnel time.

1. Description of Publicity Campaign

Data collected on publicity effectiveness focused in two areas: the number of adult learners attracted by each publicity medium, and the existing library use patterns of learners participating in the project. Table 19 shows the relative effectiveness of each form of publicity in drawing adults into the project. Comparisons are made between initial testing phase publicity and expansion phase publicity because the library shifted its emphasis from mass media in the first case to library and community displays in the second case. The results show that mass media attracted 67% of the learners in the initial phase and 37% in the expansion phase. The number of learners attracted by library displays

Table 19. Publicity Effectiveness: Atlanta

Media	Initial Testing	Expansion Testing	Total
Television	14%	8%	11%
Radio	27%	8%	17%
Newspaper	26%	21%	23%
Library Displays	19%	38%	29%
Meetings	1%	4%	3%
Other	11%	17%	14%

doubled in the expansion phase. The library plans to continue using the approach tried during the expansion phase by putting emphasis on branch library poster displays and on the development of slide-tape presentations for use with community groups.

With regard to library use pattern of the learners it was found that 50% considered themselves frequent library users. Approximately 12% indicated that they seldom or never used the library.

2. Description of Adult Learners

Adult learners participating in the project were characterized in terms of three demographic characteristics: age, education and sex. The age distribution of the learners is displayed in Figure 11. It can be seen from this figure that the program essentially attracted young adults with 73% of the total learners being 35 or younger. This trend was more predominant in the initial phase with 78% under age 35 compared to 69% in the expansion. The contrast is even greater in the under-age 25 category with 38% in the initial phase and 24% in the expansion. The Central library attracted more young adults in the expansion, 79% under age 35, compared to 62% in the branch libraries. Future publicity efforts will be specially targeted to age groups who are under-represented in the program to date. For example, the program

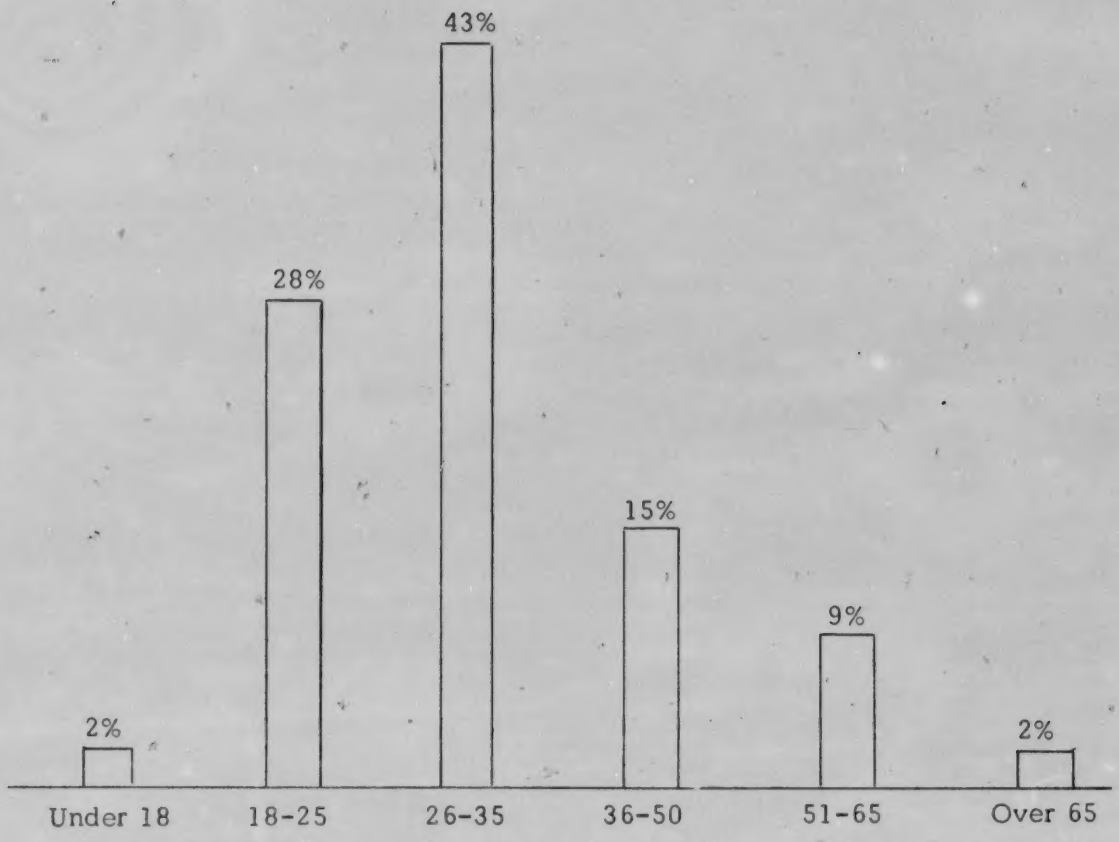


Figure 11. Age Distribution of Learners: Atlanta

participants included only 2% senior citizens; the group comprises 8.58% of the total population in the service area.

The educational distribution of learners is shown in Figure 12. Approximately 91% of the learners indicated having a high school education or better with 64% having had at least some college experience. The educational level of learners participating in the expansion phase was slightly higher than for those taking part during the initial testing phase. Comparisons between learners and the population of the service area showed a significant discrepancy with only 51.2% of the males and 48.7% of the females having a high school degree.

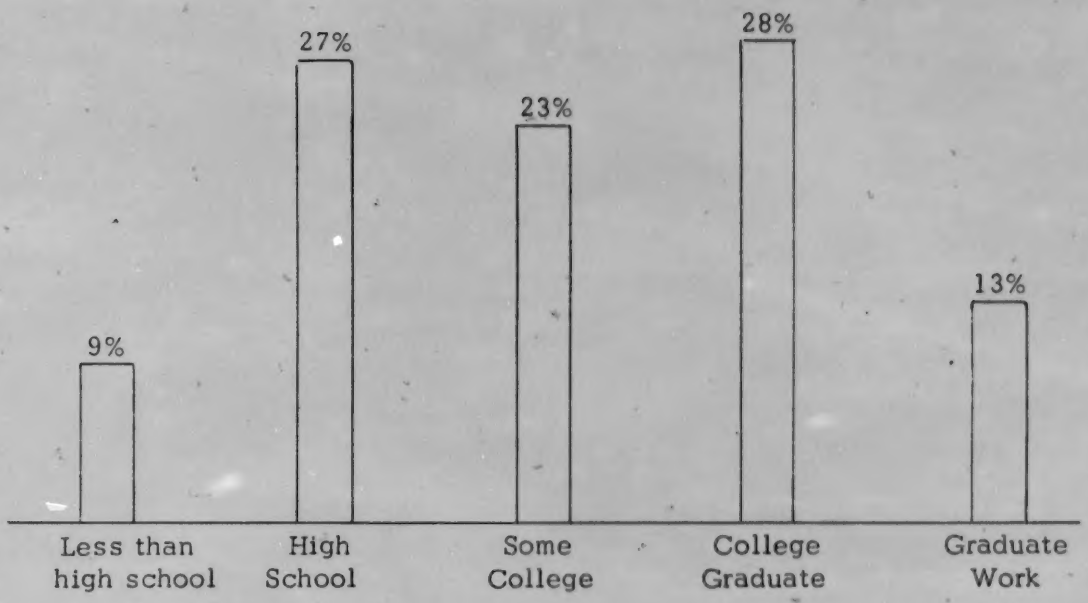


Figure 12. Educational Distribution of Learners: Atlanta

The sex distribution of learners over the testing period was 54% female and 46% male; during the initial phase there were slightly more males than females while during the expansion phase there were more females (59%) than males (41%). The sex distribution in the service area shows slightly more males than females.

3. Description of Learning Projects

The adult independent learning projects have been analyzed with regard to three characteristics: learning goals, content area of interest and the length and contact pattern associated with doing a learning project. The learning goals were divided into the three categories of personal development, job preparation and academic credit. Over the entire testing period 63% of the learners indicated their goals were in the area of personal development while 28% had job related goals and 9% were interested in academic credit. It is of interest to note that there was a shift in the expansion phase toward goals involving academic credit and job preparation; approximately 75% of

the learners indicated personal development in the initial test phase as opposed to 52% in the expansion phase. This shift may be due in part to a clearer understanding by advisors of the learning goal categories during the expansion phase.

The distribution of learning projects by content area of interest is shown in Table 20. Approximately 47% of the learning projects were categorized in humanities related areas with 32% falling into the Applied Science and Technology category. Comparisons between the initial and expansion phases indicated the following shifts: Fine arts decreased in the expansion phase (27% to 6%), while Social Science and Language increased (9% - 16% and 13% - 20% respectively).

Table 20. Distribution of Projects by Content Area of Interest: Atlanta

Area of Interest	Number	Percent
000- 99 General Works	2	2
100-199 Philosophy	4	3
200-299 Religion	6	4
300-399 Social Sciences	17	12
400-499 Language	22	17
500-599 Pure Science	7	5
600-699 Applied Sciences	43	32
700-799 Fine Arts	21	16
800-899 Literature	9	7
900-999 History and Biography	2	2
Total	133	

The length of the learning projects ranged from one day to 239. However, the lack of provision for closing out individual projects makes it difficult to obtain totally accurate figures. The average project length across the testing period was 12.22 days; no differences were found when comparing the two phases. The total number of learner-advisor contacts was 248 with an average number per learner of 1.9. The distribution of contacts is shown in Table 21. It can be seen that 54.5% of the learners contacted the service more than once.

Table 21. Distribution of Learner Contacts: Atlanta

Number of Contacts	Number of Learners	Percentage of Learners
1	60	45.5
2-5	63	47.7
Over 5	9	6.8
Total	132	100.0

4. Description of Service and Service Evaluation

Services provided were of two types: advisory and information support. The advisory services involved helping the learner define his/her learning goals and developing a responsive plan for meeting those goals. The information support service included providing material, developing reading lists, obtaining needed information from the clearinghouse and making referrals. Over the testing period materials were provided 190 times, 35 reading lists were developed and 42 referrals were made to individuals or agencies outside the library system,

Table 22 presents the evaluations of both learners and advisors in terms of their stated level of satisfaction and compares these evaluations with the performance targets set by the library. Evaluations were obtained in five

Table 22. Project Goals and Evaluation Results: Atlanta

Goal Category	Projected	Initial Phase*	Expanded Phase**	Total
Learner/Advisor Satisfaction	75%			
Learners		89%	83%	87%
Advisors		70%	69%	70%
Material Availability	60%			
Learners		63%	82%	71%
Advisors		67%	70%	68%
Material Usefulness	80			
Learners		72%	83%	77%
Advisors		73%	77%	75%
Facilities Satisfaction	50%			
Learners		61%	82%	69%
Referral Appropriateness	80%			
Learners		60%	100%***	63%

*Evaluations based on 36 learners and 63 librarians.

**Evaluations based on 24 learners and 63 librarians

***Evaluation based on 1 learner.

categories ranging from very satisfied to not satisfied. The percentages of satisfaction shown in the table are based on evaluations of very satisfied and satisfied. Significant increases in meeting all goals were achieved during the expansion phase with the exception of a slight decline in Learner/Advisor satisfaction. On an overall project basis, however, the only goal exceeded by the evaluation of both learners and advisors was the availability of materials in the Atlanta Public Library collection. The goal of satisfaction with physical facilities was only evaluated by learners and was exceeded, although this goal was set fairly low initially. The significant increase in satisfaction with facilities between the initial and expansion phases is a result of the positive responses of learners to facilities in branch libraries. Learners overall satisfaction with the project exceeded the goal while advisors satisfaction fell slightly short. The remaining goals were closely approached by the evaluation results. In addition to the specific project goals, learners and advisors were asked to evaluate the comfort of the working relationship and learners were further requested to assess the availability of the advisor when needed for consultation. Both learners and advisors indicated a high degree of comfort in working together; 97% of the learners and 84% of the advisors were comfortable in this relationship. With regard to advisor availability, 95% of the learners found an advisor either all of the time or most of the time.

5. Description of Advisor Time

Throughout the service testing period, advisors were asked to keep records of the amount of time spent in interviewing, locating and evaluating materials, making referrals, developing reading lists, completing data forms and performing clerical work. Table 23 shows the average time spent on these tasks by advisors. It is interesting to note that a fairly small amount of advisor time is devoted to completing forms and clerical work. These data will be used by the library in projecting staffing levels for expanded services in the future.

Table 23. Allocation of Advisor Time: Atlanta

Tasks	Average Time
Interviewing	21 min. per interview
Locating and Evaluating Materials	53 min. per learner
Making Referrals	20 min. per referral
Developing Reading Lists	1 hr. per reading list
Completing Data Forms	10 min. per learner
Clerical Work	5 min. per learner

D. SUMMARY

Basic questions which were answered related to demographic characteristics of learners, patterns of project service provision, time required for Independent Learning Project service provision, and evaluation of the service process and materials utilized. Comparisons were available based upon initial vs. expansion experiences, Central vs. branch experiences and learner vs. advisor perceptions of service process comparisons. Overall the service attracted more females than males. In general the learners were young adults under the age of 35 with a high school education or better. Their learning goals were mainly directed towards personal development although many learners indicated goals involving job preparation and academic credit. Humanities related content areas and the applied sciences acounted for 79% of the learning projects. With regard to service evaluation, both learners and advisors indicated positive attitudes concerning the working relationship and the information support services provided.

Questions which were not answered by the data were primarily related to learner tracking through the service delivery process. These issues are: Why do learners drop out of the program? when is a learning project

completed? how do you follow-up on referrals? and how do you follow-up to get impact data?

Plans for the future of the service include the following:

- Reassessing Availability of Materials. The library will be expanding its audio-visual collection and acquiring additional technical materials. The Program Planning and Evaluation Committee anticipates keeping an ongoing checklist of materials requested for learners but not available through the library. The list will serve as a basis for evaluating what materials need to be purchased.
- Refocusing the Mass Communication Campaign. Publicity will be intensified on a local community level utilizing community newspapers and a filmstrip-tape presentation to be used at group meetings and shopping centers.
- Expansion and Full Development of the Clearinghouse Service. The clearninghouse will include more referral sources and improvements will be made in filing and record keeping procedures.
- Expansion of Advisor Service Format. Project services will be offered to groups as well as individuals.
- Development of Atlanta Public Library's Role As A Contact Center for Learners Seeking External Degrees. Possible roles of Atlanta Public Library include testing, counseling and processing degrees.

PORTLAND PUBLIC LIBRARY

The Portland Public Library (PPL) decided to address itself to four major goals: to improve the total learning environment, to explore the idea of an educational opportunities clearinghouse and referral service, to institute a learner's advisory or consultant service, and to look into ways in which a new central library for Portland might be designed to support these new programs. Thus far primary emphasis has been placed upon the Learner's Advisory Service.

In September 1973 a volunteer planning and evaluation group (P&E group) was formed. This group was to have several responsibilities such as: working with the administration in setting the broad goals and objectives of the adult independent learning project, interpreting and reporting these goals and collecting staff reactions and comments, designing and establishing specific programs of service in response to the broad goals, and planning for the training of staff according to the needs of these new service projects. In keeping with the theme of broad participation underlying most of Portland's endeavors, membership in this group totalled ten, and included department heads and departmental assistants. Although broad participation was achieved, it was at the "expense" of reaching consensus of opinion rapidly.

Although the training which the P&E group received in planning was essentially based upon the Context-Input-Process-Planning model (CIPP), the group had considerable difficulty in determining precisely what the decision-making apparatus of the P&E group was. Those decisions which did emerge from the P&E group were primarily the making of relatively small task forces assigned specific responsibilities. Task forces were designated for directing training, establishing the Learner's Advisory Service (LAS), compiling the educational opportunities clearinghouse and

referral service, and writing the initial planning document.

The first planning document of the P&E group contained six specific charges.

1. Conducting a needs assessment through the collection of all available information on educational opportunities in the Portland area.
2. Documenting meetings through the use of volunteers, a method which proved somewhat less than successful.
3. Developing staff awareness through the form of planning the training events and making P&E members available for staff feedback.
4. Forming task forces to specific program ends. Such task forces included those which worked on training, development of data and interview forms, evaluation of data, preparation of planning and training documents, establishment of trial learner's advisors and the compilation of the educational opportunities clearinghouse and referral service. A serendipitous result of the proliferation of such task forces has been the feeling of collaboration and cooperation felt by the whole PPL staff.
5. Preparing an overall planning document, to serve mostly as a memory bank.
6. Preparing a planning document for the pilot project which served essentially as a checklist of things to be done.

As the P&E group developed and refined its ideas up to and through the end of the pilot project in March of 1975, numerous meetings were held. Following March 1975 some members of the group were losing interest. "The enormous amount of time and energy that had gone into the planning and implementing of the programs in the pilot project had not set the world on fire and some staff members were disenchanted."

Training sessions proved to be vital elements in achieving staff commitment to the project. The time element proved to be a major difficulty among staff who felt that they had not sufficient time to absorb all of the information generated by the workshops. This feeling may have been due

to the P&E group's desire to allow the service concept and target populations to evolve as the service was being implemented. Later, when service was more defined, training needs emerged formally including educational planning, counseling and career guidance, compiling a referral service, small group study methods, development of case studies, library and project awareness, selection and use of audio-visual hardware and software, investment and finance sources, sampling and survey techniques, nontraditional education opportunities, government documents, computer capabilities in adult learning, management for department heads, reference department orientation, and public relations.

The Learner's Advisory Service was intended to provide assistance to learners in clarifying learning goals, assistance in planning and carrying out a learning project, help in identifying, selecting and sequencing materials, referral to agencies and individuals able to further the learner's project, and encouragement and moral support to independent learners. Originally it was thought that a library-consultant team approach would be best. The difficulty in communicating and coordinating team members' experiences proved to be great. "The teams were artificial. The actual experience was more natural." The LAS was operated from a learner's advisor desk located in the circulation department of the main library. The specific service involved initiating contact with library users and explaining the LAS, conducting screening interviews, scheduling follow-up sessions, assembling the learning options, examining these options with the learner, and following through with each project. As the pilot project proceeded, the expected response did not materialize and the service was gradually lessened in ways which would allow a learner's advisor to devote more of his/her time to library activities in general. The number of learner's advisors was also decreased. As the pilot project came to an end, it became evident that an adequate plan was lacking for entering the next phase of

development. Local and in-house publicity proved to be the most effective way of attracting potential learners to the library.

The Educational Opportunities Clearinghouse and Referral Service (EOCRS) was designed as a support for the Learner's Advisory Service. Much information was obtained regarding educational opportunities available. The process of compiling and revising the EOCRS through contacting community agencies proved useful in describing and publicizing the PPL service.

Initial elaboration of records proved a difficulty in the early stages of the pilot project. Learner's advisors could not, or would not, fill out all of the requested information. Record keeping forms were eventually extensively revised, but still did not prove entirely satisfactory to the staff. It was eventually concluded by the P&E team that the type of information which was being collected was "apparently" not the right kind of information.

Characteristics of adult independent learners were at least partially identified, with the following general conclusions reached by PPL:

1. No specific target group emerged.
2. Goal clarification of learners was of primary importance in LAS.
3. Time estimates for assisting learners proved to be overestimations.
4. Data forms needed extensive revision to capture information actually needed to describe the learning process.
5. LAS could be provided to a significant number of adults.
6. PPL's collection of non-print materials did not adequately support the needs of adult independent learners.
7. More attention needed to be placed in the area of providing publicity.
8. Planning must stay ahead of actual activities in order to prevent serious lags between the completion of one phase of the project and the next.

9. Specific training needs were uncovered through the experience of working with learners.

10. The value of a pilot project is in gathering and refining information needed for full-scale implementation.

11. Working together towards a common goal is both valuable and difficult.

12. More attention needed to be placed on communication between all elements of the library staff.

13. In trying to work wholly on a volunteer basis, attention needs to be given to more positive reinforcement and support for volunteers both from administration and from staff.

14. Traditional library clerical duties needed to be consolidated in order to allow more staff time for providing needed services to patrons.

The information provided on the preceding pages has now been updated through a telephone survey conducted by members of the Portland Public Library (PPL) concerning the Learner's Advisory Service (LAS).* The purpose of the survey was to develop a more effective interview form with which to acquire additional information and to correct erroneous information about learners who had used the LAS. An attempt was made to contact all 104 learners who had made use of the LAS from October 1974 through June 1975. However, because some learners did not have telephones, had never really begun their learning projects, or had only made inquiries concerning the LAS, 29 learners were eliminated from the survey. Seventy-five learners were contacted by mail and asked to participate in the survey. Of these, 12 refused to participate, 16 could not be reached, leaving 47 learners who

*The report of the telephone evaluation survey was prepared by Dr. Joseph F. Hearns, Assistant Professor of Psychology, University of Maine, Portland-Gorham.

eventually participated, or 64% of the sample of 75 learners who were contacted by mail.

The demographic data for multiple visit learners was compiled from 35 telephone interviews with 15 male and 20 female learners. These learners were either young adults or older adults; only one of the learners did not have a high school degree, while over half of those interviewed had some post-high school education. With the exception of 4 students, most of the learners had been out of formal education for many years although over 60% of the learners had taken some courses on a part-time basis. There was also a relatively even distribution of learners across occupational categories, although the LAS seemed to attract individuals with more available free time, such as housewives and retired persons.

The goals of most learning projects were related to the increase of knowledge in a particular area or the increase of previously acquired skills. The skills development projects were concerned with foreign languages (predominantly French and Spanish), secretarial skills, speed reading, and other related endeavors. Projects concerned with increasing knowledge were of a wide variety, varying from apple growing to hang glider construction. Curiously, only 3 projects seemed to be directly related to pleasure and recreation. Sixty percent of the learners claimed to have previous skills necessary for their projects; but the subjective rating of these skills was generally very low. Additionally, over half of the learners acquired these skills through formal coursework. Interestingly, there was a strong negative correlation ($\rho = -.71$, $p < .01$) between the learners' evaluations of their previous skills and their subjective evaluations of the educational priority of their projects; indicating the lower the skill level, the higher the rating of the educational priority.

Only 16 of the learners were still working on their projects; while the others had terminated their project because they had moved away, had no

time to devote to the project, had lost interest in the project, or had completed the project. For those still working, the scope of the projects remained basically unchanged. The number of hours per week spent on the projects ranged from one to 40 hours with a modal value of five hours. Although an attempt was made to determine if there was a relation between number of library visits, the number of hours per week spent on the learning projects, and the goals of the learning project, no significant correlation was found.

Sixty-eight percent of the learners agreed they were attaining the goals which they had originally set for themselves; and virtually all felt that the librarian who functioned as their learning advisor understood the scope of their project. In many instances, a step-by-step plan was not developed to be used to attain the goals of the project; rather, the interaction between most learners and learner advisors was flexible and informal. Most of the materials were available in the library, and, in all cases, the materials were useful. Many learners were referred to other individuals or agencies in the community for consultation concerning their learning projects. Those who made use of the referral expressed the opinion that the referral was helpful in reaching the goals of the project.

The demographic data for single visit learners was compiled from a sample of 12 telephone interviews, a sample only one-third the size of the sample of the multiple visit learners. The data from the 5 male and 7 female learners indicated a fairly even distribution of age. Several learners did not have a high school degree; and, while the majority of learners had some post-high school education, none of these learners possessed any post-graduate education as was found with some of the multiple visit learners. All of the single visit learners had been out of formal education for some time; in most cases, longer than the multiple visit learners. However, over half of the learners had taken some courses on a part-time basis. White collar workers

comprised over half of the single visit learners; while the remaining learners were fairly evenly distributed over the other occupational categories.

The goals of most learning projects for the single visit learners were also related to increasing knowledge or skills in a particular area. The skills development projects closely paralleled those found for multiple visit learners, concentrating on the development of foreign language and secretarial skills. Interestingly, 4 of the projects were directly related to job advancement or change while none of the projects of the multiple visit learners was associated with this category. Only two learners claimed to have previous skills associated with their project and both acquired these skills through on-the-job training. When asked to rate their previous skills concerning their learning projects, the single visit learners also rated their skills very low. The correlation between the subjective rating of previous skills and the rating of the educational priority of their learning projects was low and nonsignificant ($\rho = +.11$).

The subjective rating of the educational priority of the learning projects for single visit learners varied widely and could generally be considered lower than the same ratings given by multiple visit learners. When asked why they did not pursue their projects through the LAS, over half of the learners responded that they were either taking a course or had been referred to another individual or agency in the community. Several others complained about the lack of material while others either had no time to initiate the project or became disinterested in the LAS.

The data acquired from the telephone survey of multiple and single visit learners has been beneficial in several respects. Firstly, certain demographic data which previously had not been acquired from many learners is now available and is compatible with the new coding sheets developed for the national project. Secondly, insights have been gained concerning any previously acquired skills of the learners and the rating of the educational priority of their project. For multiple visit learners there is an inverse

relationship between skill level and educational priority. Because of low skill levels and high educational priority, these learners were willing to continue with the LAS. Single visit learners did not demonstrate the same relationship which may have contributed to their termination from the LAS.

Other benefits of the telephone survey were determined from the comments of many learners who expressed a keen interest in the LAS and wished for its continuance. Of special interest are the comments of learners who were referred to other individuals or agencies in the community. Those who made use of the referrals were almost unanimous in their praise concerning the outcome of the referral. Perhaps the most important negative comments concerned the lack of availability of materials; in some instances, the material for a particular project was not available when the learner wanted it. However, when the material was available, there was a unanimous response of its usefulness.

The overall impression conveyed by the telephone survey concerning the LAS centered on its acceptance as a valuable program to be continued by the Portland Public Library. As a group, the multiple visit learners were more positive about the program than the single visit learners; yet the level of criticism directed at the program by these learners was surprisingly low, centering about the fact that the program did not meet their needs or expectations. However, most of the single visit learners considered the program valuable and thought the referral service was beneficial.

One last note concerning the time involved in the survey. The telephone survey was conducted over approximately a three month period from October through December 1975. It is difficult to evaluate the amount of staff time and planning which went into the survey; however, data is available concerning the conduct of the survey. The average time spent conducting the survey was fifteen minutes for the multiple visit learners and ten minutes for the single visit learners. This temporal difference is due largely to the shorter

form used for single visit learners. Using these averages, the total collection time for the actual survey was approximately eleven hours.

SALT LAKE CITY PUBLIC LIBRARY

Within the set of goals established by the Salt Lake City Public Library (SLCPL) lay the charge to "serve as a primary source of educational materials for individuals involved in informal self-education or continuing education..." With this charge in mind, and with an historical commitment to serve the individual uninterested in formal institutionalized education, SLCPL determined to participate in the national program for the establishment of adult independent learning projects. Specifically, SLCPL wished to establish an appropriate advisory service for adult independent learners. For SLCPL's purpose, an adult independent learner was initially defined as: an individual whose library-related project is not designed and/or controlled by a formal education institution; an individual with at least a grammar school education but not affiliated with a high school, who has assumed an adult role in society; and an individual whose learning project consists of at least three meetings between himself/herself and a member of the library staff whose role is learner consultant, and a minimum of seven hours of learning activity conducted solely by himself/herself. This definition was later refined as the result of project experience.

Early in the program, a Program Planning and Evaluation group was formed. The role of the PP&E group was to plan and evaluate the proposed program. The group consisted of the Director of Libraries, the Coordinator of Extension Services, the Coordinator of Adult and Information Services, the Head of Fiction and Literature, and the Head of General Collections. It was decided not to include other on-line librarians, although an 18 member consultant staff would meet frequently with the PP&E group in order to provide feedback.

Within a short period of time, the PP&E group defined its duties as consisting of three major categories: (1) tasks, (2) knowledge and skills, and (3) organization.

Among the tasks identified by the PP&E group were:

a. to assess community needs for library learning advisory service.

b. to formulate program goals in relationship to community needs and to the library system.

c. to formulate program objectives for desired outcomes.

d. to design action models.

e. to establish training packages.

f. to evaluate community assessments, goals, objectives, actions, operations and training before implementation in terms of predicted outcomes and make decisions to implement, to modify, to change, or to stop.

g. to describe operations clearly and specifically.

h. to establish measurement procedures for evaluation and decision-making.

i. to implement the program.

j. to make decisions based on evaluation to keep, modify, change or stop the program within the library system.

k. to report indicators and outcomes in relationship to goals and objectives to staff and management.

It was decided that the PP&E group should focus on the following knowledge and skills variables in order to effectively implement the program:

a. community assessment.

b. the Adult learner and the Learning process.

c. program goal formulation.

d. program objectives formulation.

e. action and model building.

f. training development.

g. evaluative measures.

h. leadership.

Specific training was to focus on:

a. methods of conducting community needs assessment.

b. methods of knowing the adult and how the adult learns.

The PP&E group developed training designs for staff after examining statements of goals and objectives and determining what tasks would be implied by these statements. Several priorities in training were delineated and evaluated through "post-reactive" forms. These priorities included: understanding the philosophy and mechanics of the program, interpersonal communications, including communications skills development, decision-making techniques, problem solving and communications evaluation, adult learner psychology, including interviewing techniques, needs assessment, motivation of adult learners and adult learner evaluation techniques, and independent and group discussion techniques, including leadership development, discussion participation, subject development, conflict resolution, and techniques for evaluating learning through the discussion process. Training was accomplished through monthly meetings with all librarians involved in the project, use of audio-visual materials, and workshops conducted by outside consultants.

An 18 member consultant staff of librarians in SLCPL provided the Learner's Advisory Service. Initial provision of service was limited to the central library but later included three branch libraries. Publicity for the service was presented through the use of radio announcements and newspaper articles. Attempts were made to use local library materials, such as buttons to be worn by staff, but these met with some resistance. The service was implemented in two stages. Stage one was a pilot which lasted from October 1974 to January 1975. Stage two was an expansion phase which began in March 1975.

Evaluation mechanisms were developed after the start of the project. Seven forms for data collection were developed after much revision and reflected the nature of the service provided. These forms were: an interview form, a progress report, a progress evaluation interview form, a form for evaluating the usefulness of materials and resources, an evaluation of referrals, and a learner evaluation form. Little comment is given by SLCPL on the success of these forms. Data from these forms were collected and summarized monthly and cumulated quarterly.

The prime value of the program to SLCPL was in the definition of what precisely is an adult learner. By analyses of data collected, summative data are able to be presented to administrators who then may make decisions relating to costs and performance. Although interpretation was not extensively presented in the SLCPL report, a better research and test design is clearly indicated by the SLCPL staff.

Some general conclusions were reached. Numbers of inquiries relating to independent learning projects exceeded that projected as target, as did the number of identified independent learners. Although most consultants expressed less satisfaction with the service than had been anticipated, learners tended to express slightly more satisfaction with the service provided than was expected. Although the usefulness of provided materials was considerably less than had been expected, satisfaction with the consultant's effort to help plan learning goals and objectives was high. The most successful effort on the part of the consultant was in providing effective referral service. The attempts at data collection need to be revised for those places "where data seems not to be accurate."

TULSA CITY-COUNTY LIBRARY

The results of the Tulsa City-County Library (TCCL) Adult Independent Learning Project are presented in a draft report compiled by a case study team from The University of Tulsa. The following is a summary of that report:

The Tulsa City-County Library system consists of a central facility and 18 branches serving a community of over 425,000 with a per capita circulation of 3.6 during the period July 1, 1973 to June 30, 1974. Total staff employed by the system numbered 173, of which 36 were professionals.

The decision to participate in Adult Independent Learning Projects led to the participation by TCCL staff in numerous training workshops, both at the national level and at the local level. Additionally, various types of public relations material had been prepared by library staff prior to initiation of a pilot project completed in 1975. During implementation of the project, emphasis was placed upon data gathering by the case study team. Five phases of data gathering took place. Each phase was viewed in terms of several dimensions which included task accomplishment by librarians and perceptions of services provided by both librarian and patron. A major concern of project management was to determine the nature of the managerial style under which effective Adult Independent Learning could take place. A summary description of each phase in the data gathering process will now be presented, followed by analysis of the service itself.

During January 8, 1975 to February 1, 1975, the case study team visited all branches of TCCL in order to gather informal information on the impressions of project staff towards Adult Independent Learning (AIL) projects. A difficulty was perceived by staff relating to proper identification of a learner's goals. Project staff felt less than enthusiastic about the necessity of record keeping and, for the most part, seemed unable to clearly

understand the use to which such records would be put. Impressions of project management were positive but cautious. Fears were expressed that project management might not be aware of the implications of AIL projects for staff loads.

The case study team again surveyed the impressions of project staff, visiting 14 of the 18 branches and the central library 4 times. Traditional library functions of a clerical nature were found to be most popular thus far among project staff with a corresponding hesitancy to move towards more innovative service. This feeling may have led to the success of a previously developed referral file. Staff disenchantment with record keeping increased as did a strong desire to know specifically what data was needed, why it was needed, and how it would be used. A dichotomy between project management and project staff continued to develop, resulting in a growing staff morale problem.

During March 1975, phase A was brought to a close. Eight of the 18 branches were visited as was central. Major activity was directed towards the development of a library staff questionnaire as well as an interviewing guide for data gathering among independent learners. No substantive changes were noted among project staff attitudes.

During the transitional period between phases A and B, conferences were held with Suzanne Boles, Community Services Coordinator, in an effort to modify proposed questionnaires and reassess the emphasis of the continuing case study. A tentative schedule for data collecting was established.

May saw the administration of a 58 item questionnaire to librarians. Data thus collected were viewed in terms of three dimensions: (a) relationship to phase A findings, (b) relationship to what tasks were performed by librarians in serving the AIL's needs, and (c) relationship to a description of what processes were at work in the librarian-learner interaction.

Results of the librarian questionnaire revealed that there was no significant difference between perceptions of project staff and non-project staff on the importance of the AIL project but that there was a significant difference on the matter of record keeping. Analysis tended to confirm the case study team's observations that record keeping continued to be a morale problem among significant number of staff. The impressions of the case study team as to the negative view of project staff towards project management was confirmed, although to a lesser degree than had been anticipated. Confusion was still felt by project staff as to the precise definition of the Adult Independent Learner. A clear and positive view of the integration of AIL projects with traditional library services manifested itself. Evaluation of the AIL's progress towards achieving his/her goal still presented a problem to most project staff members.

Specific tasks performed by librarians involved in the project were identified. These were: (a) attending both national and TCCL sponsored workshops on independent learning, (b) obtaining materials for their learners, (c) identifying patrons for inclusion in AIL projects, (d) identifying learning goals of AILs, (e) personalizing library services to AILs, and (f) making referrals to other community agencies. Those tasks perceived by project staff as not being accomplished were: (a) preparing and using learning guides, (b) monitoring learner progress systematically toward goal achievement, (c) using mutually convenient scheduled appointments to consult with AILs, (d) sequencing AILs' learning experiences, (e) conveying to AILs that ample time was available on the librarian's part, (f) completing satisfactorily the records requested by the AIL project and/or TCCL management.

In the dimension of interpersonal relationships, findings indicated that "the quality of independent learning services in TCCL varies in proportion to the individual librarian's level of interpersonal competence."

Phase C involved follow-up interviews with selected staff who were considered to be more active in the project than others. Certain trends were apparent. Early enthusiasm for the project had worn off and a greater degree of responsibility for the success of the project had taken its place. Record keeping was still considered a major problem which was beginning to be viewed as a necessary evil. Criticism of management, both of TCCL and AIL project, still occurred, based mostly upon the perceived isolation of management from project staff, although considerable satisfaction was expressed with TCCL's willingness to tackle a difficult task. Project staff found themselves more able to successfully identify AILs and to relate AIL projects with "good" librarianship.

Phase D involved analysis of a 28 item verbal questionnaire administered via telephone to learners. Thirty-nine percent of learners indicated that they had been asked by library staff their opinion on the conduct of AIL projects. However, most AILs expressed no opinion. General enthusiasm for the project was as apparent among learners as among project staff. Most learners indicated that they were satisfied with the conduct of the project by the librarian involved.

Based on statistical analysis of data obtained from phase D, follow-up telephone interviews were held with selected learners. Although project staff tended to view AIL projects as not differing substantially from traditional librarianship, AILs tended to view such projects as unique and different from library programs which they had encountered before. "It is apparent that the learners for the most part do indeed perceive certain parts of the independent learning project as something different from typical day to day library use." Although librarians tended to view the planning of projects in a step-by-step manner as difficult, learners did not.

Following are the conclusions and recommendations of the case study team:

1. Quality control of time spent by library staff with AILs needed to be improved.
2. Those librarians most active in AIL projects viewed their efforts as not differing from good librarianship.
3. AIL projects tend to change perceived views of library services by library patrons.
4. Project record keeping is a necessary evil.
5. Library staff are the most critical variable in attracting patrons to the AIL project.
6. Librarian-learner interaction is a particularly positive element in AIL projects.
7. Study guides are not being used to full potential.
8. Those learners interested in educational credit appear to merit more consideration above those learners without such specific goals.
9. "There are management-staff relations impacting AIL project service delivery negatively enough to warrant management attention."
10. Three positive elements can occur as a result of such projects as AIL projects: (a) professional growth, (b) increased publicity, and (c) increased library patronage.

Recommendations of the case study team were:

1. A clearer specification of time for librarians to work with AILs.
2. The term "project" should be replaced with "service" in order to clearly indicate the integrative nature of AIL projects.
3. The record keeping activities of AIL projects should be held to a minimum.
4. For the purpose of enhancing staff morale, emphasis should be placed upon the "uniqueness" of AIL projects.
5. Strong efforts at communicating the results of AIL projects should be made by TCCL management.

6. Continuing workshops in interpersonal relationships should be held.

7. A mechanism for rapid development of "custom-made" guides in AIL projects should be developed.

8. TCCL should actively serve as a catalyst in the establishment of an advisory committee whose purpose would be to submit a proposal for additional funding of continuing adult educational projects.

9. TCCL management should "initiate an in-depth evaluation of management-staff relations utilizing professional management consultant personnel."

10. TCCL should share its experiences with other library systems.

11. TCCL should make its experiences available to Schools of Library Service.

FREE PUBLIC LIBRARY OF WOODBRIDGE

The Free Public Library of Woodbridge (FPLW) is an area public library serving the population of Middlesex and adjoining counties in New Jersey. A central library facility, opened in 1974, and nine branches serve the area. Total circulation in 1974 amounted to 650,601 items. There were 38,829 registered borrowers with access to a collection of 302,729 items in 1974.

The Woodbridge community has been described by the FPLW as follows: in 1970, the median school years completed by adults 25 years and older in Woodbridge was 11.7 compared with a median of 12.2 for New Jersey as a whole. For this same group of Woodbridge residents, only 53.4% had graduated high school, and only 15% had completed one or more years of college. Most Woodbridge workers tended to be employed in clerical and manufacturing occupations with a smaller percentage of the work force employed in more highly skilled occupations.

Until its participation in adult independent learning projects, FPLW had devoted much of its time and resources to children's and young adult programs. With the recognition that a significant increase was occurring in the ratio of adults to children, the invitation of the Office of Library Independent Study and Guidance Projects in 1973 seemed particularly welcome to FPLW. FPLW's participation in the program was to involve the creation of an advisory service "to support adults in the pursuit of learning projects, whether they are affiliated with a formal learning structure, pursuing credit-by-examination or short-range practical ends."

Staff from FPLW attended national workshops and seminars held by the national faculty in 1973. In February 1974 a Program Planning and Evaluation group was selected and charged with the development and expansion of advisory service. Originally administrators composed the membership of the PP&E group and included the Coordinator of the Main Library, the

Coordinator of the Branches, the Coordinator of Adult Services, the Assistant Coordinator of Adult Services, the Projects Coordinator, a Branch Head, and the Library Director. Later the Data Bank Librarian, an adult services librarian, and an adjunct faculty were added.

The adjunct faculty was composed of four professionals having responsibility for working with the PP&E group and for planning the staff training sessions.

June and July 1974 saw the final development of a service plan which was presented to the national faculty at the August ETS national workshop. A pilot project was instituted in November of 1974 and ended on May 11, 1975.

As membership of the PP&E group was large, smaller task forces were formed, ad hoc, to perform specific duties. Decision-making remained in the hands of the PP&E group as a whole. However, as it became more difficult to coordinate the meeting time necessary for the entire PP&E group, decision-making eventually devolved upon a small task force consisting of the Coordinator of Adult Services, the Assistant Coordinator of Adult Services, and the Projects Coordinator. This approach proved less than satisfactory and decision-making again was vested in the entire PP&E group. Specific duties of the PP&E group were identified as describing the community to determine need for library's Independent Learner Project (Needs Assessment), develop and maintain program planning and evaluation skills so that the group could effectively function as the project's decision-making body, developing the concept of a learner's advisory service, developing and writing a project plan, developing the concept of a data bank, developing the data collection and evaluation system, developing training plans from needs analyses, designing the public relations program, making recommendations to library administration on policies which might need to be adjusted as the project progressed, and maintenance of both in-house and external channels of communication. All of these elements were incorporated into the general plan for service developed by the PP&E group.

Development of a training plan began in August 1974. It was decided that the entire FPLW staff would be divided into four groups, each of which would receive training geared to their particular needs. The necessity to develop an adequate plan for the implementation of training produced some strain among the members of the PP&E group. Many of the PP&E group did not approve of the necessity of going through the planning process prior to implementation. Eventually, a needs assessment tentatively identified those gaps in knowledge which would have to be closed in the training package. However, the generality of the training package initially developed needed to be revised in order to allow for specific plans of action. Particular training tasks needed to be identified as well as specific training objectives. Heavy use was made of outside consultants, a process which did not, on the whole, prove successful. Much difficulty was experienced in translating "project jargonese" to consultants. A negative attitude on the part of some consultants was also experienced by project staff.

Training group I consisted of those librarians directly involved in the project. Membership in this group numbered 22, of which all were adult services, young adult services, and administrative librarians. From October 1974 to July 1975, training would be given in such diverse subjects as decision-making, understanding the adult learner, and educational uses of non-print media. From July to September 1975, conversion training would be given in-house prior to implementation of full service in September 1975.

Training group II consisted of those staff members who would not be involved in private consultations with adult learners but would be involved in making the initial contact with the adult learner. Membership in this group numbered 18, of which all were either children's librarians or supervising library assistants in the public service area. Most of the training given to this group would involve interpersonal communication skills and record-keeping techniques.

Training group III was composed of all public service clerical staff other than supervising library assistants. Since the members of this group would be involved in daily contact with potential learners, they might be expected to be asked questions about the Learner's Advisory Service. Training for this group was limited to definition of the scope, operation, and expectations of the project. Their own specific roles in the project were identified and discussed.

Training group IV was composed of non-public service clerical staff who work in administration and technical services, as well as the maintenance staff. It was felt that these staff members should have a basic understanding of all library services including the Independent Learner Project. Training for this group would involve summaries of project development and explanations of changes in the conduct of the project which might take place.

The training sessions were not evaluated prior to the pilot project. What evaluation took place was limited to that conducted by the national faculty. However, during the pilot, evaluations of individual workshops did take place in-house on both a formal and informal basis. General disillusionment with outside consultants was especially apparent during this in-house evaluation.

Three categories of service were envisioned: advisory, informational, and referral.

All Public Library branches offer some sort of advisory service, either through the physical presence of a learner's advisor or through referral to a learner's advisor at another library agency. Full consultation service was offered by the main library with a learner's advisory staff of seven adult services/reference librarians and one young adult services/reference librarian. The major tasks of all learner's advisors are consultations, the provision of support materials, and referral. Learner's advisors are

encouraged to sequence the learning plan through provision of materials either from the library's collection or through the use of interlibrary loan.

Informational support for pilot project learner advising was accomplished through the development of a data bank. The data bank is an in-depth and up-to-date survey of "whatever information and materials are needed specifically by the library to act as a viable learning center for independent learners." It consists of a card file, a vertical file, and a reference collection of directories and other similar guides. Brochures, application blanks, test practice booklets and other such ephemera are included in the data bank. A basic data bank collection is available in all FPLW branches. Staffing the data bank proved a problem due to lack of sufficient clerical help. Major emphasis has been placed, and will be placed, on acquiring information on materials suitable for credit-by-examination programs.

From the beginning of the Independent Learning project, major emphasis has been placed by FPLW staff on what forms would best gather the information needed for evaluating the project without hindering the provision of service itself. Nevertheless, throughout the pilot project complaints were voiced as to the value of whatever forms were in use at the time. Difficulty of use, relevance of questions, and wideness of scope beyond the pilot project formed the majority of these complaints. Six forms were used to record information: an initial contact card, an interview form, a resource utilization log, a staff time log, a learner's evaluation form, and a learner's advisor's evaluation. Filled-out forms were pulled monthly and analyzed by the PP&E group. Quarterly summaries were sent to the National Office.

Formative evaluatory forms were lacking in the evaluation system designed by FPLW staff. Consequently, a mechanism for advisors to record information about learning projects as they progressed was not available. This gap led to the necessity of conducting follow-up evaluations of learning projects after the completion of the pilot project. Sufficient data for judging whether or not the pilot project targets were reached proved to be

TABLE 24 - SERVICE PROFILE: WOODBRIDGE

data source	category	number learners	percent learners
pilot	-	79	-
	sex		
	male	32	40.5%
	female	47	59.5%
	age		
	25-34	20	25.3%
	35-54	26	32.9%
	occupation		
	white collar	18	22.8%
	blue collar	6	7.6%
	housewife	14	17.7%
	learning goal		
	college degree	36	45.6%
	college credit	18	22.8%
	high school diploma	13	16.5%
telephone survey	-	32	-
	frequency of library use once a week, or once in two weeks	19	59.4%
	prior knowledge of educational opportunities?	12 (yes)	37.5%
	degree of satisfaction with service moderately to very satisfied	31	96.9%
	patron would recommend service to others	30	93.7%

SERVICE PROFILE (continued)

data source	category	number learners	percent learners
mail survey	-	45	-
	frequency of library use		
	once a week or once in two weeks	19	42.2%
	prior knowledge of educational opportunities?	28 (yes)	62.2%
	quality of information presented to learner		
	nearly appropriate	19	20%
	nearly accurate	18	40%
	nearly adequate	16	35.6%
	length of wait for materials		
	immediately	18	40%
	value of information presented to learner		
	timely	21	46.7%
	easily understood	17	37.8%
	degree of comfort		
	moderately to very comfortable	33	76.4%
	degree of satisfaction		
	moderately to very satisfied	50	88.9%
	patron would recommend service to others	34	75.6%

TABLE 25

EVALUATION OF TRAINING SESSIONS
USING OUTSIDE CONSULTANTS: WOODBRIDGE

training session	subject matter	quality of presentation	utility	manner of presentation	overall rating
reading	fairly simple	enthusiastic	very useful	clear	very good
educational use of non-print material	very simple	of little help	of little practical value	muddled and boring	below average
interpersonal communication	fairly complex	enthusiastic	very useful	clear	excellent
decision-making	fairly complex	enthusiastic	very useful	clear	very good
adult psychology	of some value	-	of some help	unclear and uninteresting	average - below average

generally lacking. Certain conclusions could be made, however. A far less number of patrons inquired about Independent Learning projects than had been anticipated. Conversely, a greater number of initial inquirers returned for consultations than had been anticipated. A total of 192 contacts took place, mostly during the late afternoon. The majority of inquiries were directed towards credit-by-examination programs.

The interested patrons who became independent learners were between 25 and 54 years of age, high school graduates, and female. White collar workers predominated followed by household workers. By far most of the learners had learning goals related to earning college credit or degrees, with the subject of business predominating. A follow-up mail and phone survey of independent learners indicated that most were satisfied with the help which they had received and comfortable with the librarian involved.

CASE STUDY CONCLUSIONS

On the whole none of the five "case" libraries experienced any major surprises. The libraries tended to view their experiences in Adult Independent Learning projects as positive. However, numerous tensions were experienced in managing these projects, a fact which is explicitly stated in most of the draft reports and clearly implicit in others.

Four of the five libraries vested control of the planning, though not necessarily the decision-making, of adult learning programs in the hands of a specific group chosen for this purpose. Most groups limited their memberships to approximately five professional personnel, with the range going from 5 to 10 professionals. The PP&E group might be expanded to include various subsidiary groups, termed "adjunct faculty" and the like, whose primary function was to advise the major Program Planning and Evaluation Group. The role of the PP&E group was two-fold: first to act

as a clearinghouse for all data collected in the implementation of the project; and, second, to determine the specific direction of the program. Each of the PP&E groups was also charged with the responsibility of producing written documents delineating goals, objectives, and action plans. Two libraries, Woodbridge and Atlanta, produced such documents and appended them to their reports.

Each of the draft reports from Atlanta, Portland, Salt Lake, and Woodbridge discussed in some detail the workings of their particular PP&E group. The Tulsa report, curiously, does not cover the activity of its PP&E group. All five libraries experienced some managerial difficulties. The large size of some of the PP&E groups, such as Portland's, made arriving at consensus a difficult and time-consuming task. In such cases, the usual mechanism employed in making decisions was the establishment of small task forces charged with specific responsibilities. However, care needed to be taken lest the task of decision-making in general devolved upon the heads of senior administration acting mostly alone. When this happened at one library, steps were immediately taken to bring decision-making back to the attention of the PP&E group as a whole.

Each of the libraries tended to view their participation in planning through the establishment of PP&E groups. However, the majority of libraries tended to limit membership in the PP&E group to upper- and middle-management. To achieve a greater degree of participation, an advisory group was usually selected which might consist of those librarians directly acting as consultants to learners or a part of that larger group who would be charged with specific duties, such as planning training sessions, as occurred at Woodbridge. The role of these advisory groups was to advise, but not necessarily to consent, in the decisions of the central PP&E committee.

In general, each library's PP&E group was charged with the following responsibilities:

1. Development of data collecting and evaluation methods.
2. Development and writing of service plans.
3. Communicating results of service implementation to library staff.

Training on the national and local level has already been discussed in the first part of this summary document. Little individual differences in training techniques can be detected in the library draft reports with the major exception of Woodbridge. The typical training sequence involved attendance at national conferences and workshops held by the national faculty by a few staff members, mostly administrative, and establishment of internal workshops and seminars hosted on occasion by outside consultants, for those members of the library professional staff directly involved in the project. Training sessions were planned either directly by the PP&E group or by task forces specifically designated for this duty.

The most elaborate, and atypical, in-house training package was developed by Woodbridge. This library appears to have been determined that all members of the library staff, whether professional or not, would be involved in some sort of training. To this end, four groups were selected for training, each of which was to be given information on the project ranging from detailed seminars and workshops on such diverse subjects as interpersonal communications and reading to simple summaries on the progress of the project.

Particularly interesting was the reaction of the individual libraries to the use of outside consultants, both as training group leaders and as consultants for the compiling of draft reports. Where training sessions were analyzed by the individual library, such as at Woodbridge, general reaction

to consultants was fairly negative, in some cases, quite negative. Major difficulty was seen in communicating library needs and goals to those unfamiliar with libraries. In the writing of draft reports by consultants of two libraries, one library experienced much difficulty in communicating its goals and objectives for service implementation to its consultant, another library was forced to require a major readjustment on the part of its particular consultant in order that the final report be more geared to the perceived needs of the library.

Each library implemented its new service in a pilot and expansion phase. All of the libraries which reported on publicity campaigns indicated that a change in publicity techniques between pilot and expansion appeared to be necessary. The two main methods by which patrons were attracted to Adult Independent Learning projects were newspapers and in-library publicity, the former being more important than the latter. This fact correlated with the finding that most users of AIL projects were frequent library users. Those libraries reporting on publicity indicated that more attention needed to be devoted to local publicity needs through discussion with local community groups and through more extensive in-house library publicity.

Most of the five libraries entered the program with some preconceived idea of who would be attracted by the program. Some surprises were in order for these libraries. One library, Portland, decided to allow the target population to evolve with implementation of the service. In this case no specific target group emerged. Most were between 24 and 35 years of age. Woodbridge alone differed in its learner population, with the majority of them being in the 35-54 age group. Surprising to most of the libraries was the small number of retired and senior citizens attracted to the program. The figure for this group was usually quite low relative to other categories of learners. Learners tended to be mostly female although this ratio of female to male was less than expected and differed from pilot to expansion

programs. The educational experience of learners was varied and ranged from some high school to college graduate. As a whole, the group of learners showed a fairly high level of education. Most learners tended to have at least some college experience. Occupational characteristics varied and no clear group emerged. However, of those learners in the 24-35 age bracket most were blue collar workers. Of those in the 35-54 age bracket most were white collar workers. The majority were frequent library users. Importantly, the second largest group of learners had never used the public library before.

Learning goals for each library's adult independent learners were quite homogenous. Most appeared to be interested in those subjects covered in the Dewey 600s. Learning objectives varied from personal development through job preparation to educational credit. A difficulty arose among some reporting libraries as to what constituted "personal development" and other categories due to lack of precise definition.

Data relating to user satisfaction was viewed as suspect by many of the reporting libraries. Where outside consultants interpreted the data of user satisfaction, it was usually accepted as given. One may speculate that this might be due to the librarian's recognition of the patron's usual desire to please based on experience versus the relative lack of such experience in general by consultants. Sometimes responses of user satisfaction differed from patron to learner's advisor, with the latter, for example, viewing himself/herself as more available to the patron than did the former. Both librarian and patron expressed the view that learning goals were clarified through interpersonal communication between librarian and patron.

The process of providing service to adult independent learners was similar in all of the five libraries. Three dimensions comprised this service: Learner's Advisory Service, informational service, and referral service. Learner's Advisory Service involved direct contact between a librarian and potential learner. The usual procedure was for the learner to come into the

library and express his/her interest. The patron would be directed to a learner's advisor or would make an appointment to see an advisor at a later date. Initially, some libraries overestimated the demand for Learner's Advisory Service. When this demand did not materialize, reduction in number of staffing hours for this service took place. The expected use of this service during evenings and weekends did not materialize. The average number of consultations between learners and librarians was two, with the average time per consultation being 25-30 minutes. The librarians involved in this work viewed their roles as supportative of the adult independent learner's goals and objectives. They did not view themselves as teachers.

Two of the five libraries developed elaborate informational services in support of the library's independent learning projects. Atlanta's previous participation in the Neighborhood Information Center project had left it with an extensive bank of information, which was added to and updated. Woodbridge developed a data bank consisting mostly of up-to-date information of community resources, community help agencies, and individuals willing to act as resource people for individual learners.

Referral service tended to be limited during the pilot phases and more used during the expansion phases of the projects. All patrons who were referred elsewhere expressed satisfaction with their referrals.

Each library engaged in its own data collecting and evaluation based upon forms it devised for that purpose. This individuality led to a heterogeneity among record keeping mechanisms. Certain common questions and data bases were sought by most of the libraries. These are discussed in part one of the summary report. Specifically, most libraries sought basic demographic data such as age, occupation, sex, and whether or not the patron was a frequent library user. Rather unclear definition of data categories appears in the five library draft reports.

All libraries experienced difficulty in getting proper completion of data forms. In the case of one library, a serious problem in staff morale resulted from lack of information as to how the data was to be used and what it was to be used for. In some cases all of the questions required an answer by the librarian which was not forthcoming. At least one library explicitly indicated that it discovered after the pilot project had been completed that data instruments used during the pilot did not supply the information needed.

Between 5 and 7 different forms were generally used by the libraries. These represented three basic categories: initial interview, patron's progress, and patron-librarian satisfaction with service given. Data were presented in raw numerical figures usually, though not always, converted to percentages. Sophisticated summary data sheets were usually not prepared. In the case where a statistical analysis was given of raw data, interpretation of this analysis was not readily apparent.

Coding of the data took place at the local library level. Interpretation of the coding proved difficult, due in part to the heterogeneity of the data asked for by the questionnaires, as well as the difficulty of definition of specific categories. One of the clearest needs for all libraries engaged in the provision of service of this kind is a common mechanism for collecting data, such as is now in use among project libraries.

Data collected was usually supplied to the PP&E group on a monthly basis. Attempts were made by most of the libraries to keep records relating to individual learners with the files kept by the learner's advisor until completion of the project.

On the whole, the data collection experience proved to be among the most valuable exercises engaged in by each of the five libraries. It revealed a major weakness among libraries as well as a marked appreciation of simplicity of record keeping.

Traditional library services were viewed somewhat differently by the five libraries upon completion of the various phases of the Adult Independent Learning project than before their completion. Although most libraries had developed elaborate interlibrary loan facilities, these seemed little used by learner's advisors. Library duties which were primarily clerical in nature but which were performed by professionals interfered with the provision of service and tended to be reduced considerably as the project wore on. Those libraries which either considered themselves to be operating under a more participatory management style or who wished to move to a more participatory management style found the task to be more difficult and time-consuming than they might have expected. The frustrations and problems inherent in initiating any kind of major new service were very sharply brought home to the five libraries, as was a realization that, however time-consuming these problems might be, they were necessary parts of innovative service.

Above all, the five libraries discovered that they could indeed provide adults with significant opportunities for independent learning which did not differ markedly from traditional professional conceptions of library service.

APPENDIX A

TRAINING MANUALS DEVELOPED BY NATIONAL FACULTY

TRAINING MANUALS DEVELOPED BY NATIONAL FACULTY

Program Planning and Evaluation

DeProspo, E. R. A program planning and evaluation manual. New York College Entrance Examination Board, New York, New York, October 1973.

DeProspo, E. R. Evaluation design and data system manual. New York College Entrance Examination Board, New York, New York, July 1974.

Mavor, A. S. A system for evaluating services to the adult independent learner through the public library. New York College Entrance Examination Board, New York, New York, May 1975.

Understanding the Adult Learner

Szczypkowski, R. B. Understanding the adult learner. New York College Entrance Examination Board, New York, New York, May 1974.

Decision Making and Educational Planning

Gelatt, H. B. Decision making and educational planning: A librarian's manual. New York College Entrance Examination Board, New York, New York, December 1973.

Interviewing and Need Diagnosis

Mavor, A. S. Interviewing and need diagnosis. New York College Entrance Examination Board, New York, New York, December 1973.

Guiding the Learner in the Use of Study Materials

Monroe, M. E. Preparing a reading study guide for the adult independent student: Criteria, formats, procedures. New York College Entrance Examination Board, New York, New York, January 1974.

Training Plan Development

Mavor, A. S. Training plan development workbook. New York College Entrance Examination Board, New York, New York, August 1974.

APPENDIX B

AN EXAMPLE TRAINING PLAN

INTRODUCTION

This appendix contains a set of materials related to a training sequence in Interpersonal Communications and Interviewing Skills conducted at the Free Public Library of Woodbridge, Woodbridge, New Jersey. This sequence represents only one aspect of the training planned and conducted for learners' advisors. The initial step in the training program development was the identification of advisor tasks and the skills, knowledges and attitudes required to effectively perform these tasks. Once this identification was accomplished, learners' advisors were asked to indicate their level of confidence in each of the skill, knowledge and attitude areas. These ratings formed the basis for the training program.

The first piece of material included in this appendix is a training outline prepared by members of the library staff. This outline specifies advisor tasks, the skills, knowledges and attitudes to be acquired through training, the staff to receive training and suggested methods for conducting and evaluating the training. This document was used as a guide in selecting outside consultants and as an aid for consultant preparation. The second piece of material is the workshop outline prepared by selected consultants. This material contains brief descriptions of content, methods and scheduling. The third piece of material is the training session evaluation based on responses of workshop participants.

INDEPENDENT LEARNER PROJECT: TRAINING OUTLINE

1. Content of Training: Interpersonal communication and interviewing skills.

2. Service Objective: To offer individualized consultation services to adult self-directed learners, offering them assistance through the following tasks:

   a. Helping learners clarify their educational needs
   b. Helping learners assess their present levels of knowledge and educational needs
   c. Helping learners formulate their educational goals
   d. Informing learners of the variety of educational opportunities and resources
   e. Guiding learners in the development of their educational plans
   f. Facilitating learners' decision-making
   g. Interpreting library materials and services to learners
   h. Aiding learners in interpreting their progress in terms of their stated learning goals and objectives
   i. Facilitating the learners' evaluation of their learning project(s).

3. Knowledges to be Acquired:

   a. Interpersonal communications techniques
   b. Interviewing techniques
   c. Methods for drawing learners out
   d. Techniques of aiding learners in interpreting their needs to the extra-library resources to which they have been referred.
   e. Subjective methods for measuring success.

4. Skills to be Acquired:

   a. Basic interviewing skills
   b. Basic communications skills
   c. Making learners feel at ease
   d. Drawing learners out

e. Aiding learners in interpreting their needs to the extra-library resources to which they have been referred

f. Help learners interpret their progress in terms of a stated objective

g. Ability to guide rather than direct through the interview process.

5. Attitudes and Behavior to be Acquired:

a. Amiability

b. Desire to communicate effectively

c. Feeling at ease with strangers

d. Tact and sensitivity in discussion of learners' goals, views, objectives, and prior accomplishments

e. Patience

f. Be supportive of learners.

6. Staff to Receive the Training: Group I

7. Suggested Training Method:

Group participation in role playing, case studies, discussion and drills.

8. Proposed Methods for Evaluating Training:

a. Survey trainees at end of each training session about content, format, etc.

b. Statement from trainer assessing the session, particularly group response

c. Self-assessment by learners' advisors following completion of entire training program, aimed at assessing competence level as it affects task performance.

9. Number, Length and Spacing of Sessions:

Suggest 2 full days.

WORKSHOP ON INTERPERSONAL RELATIONSHIPS AND COMMUNICATIONS

1. Community Building

Rationale: The workshop will prepare the participants for a relatively close, one-to-one relationship with adult learners. Since we will deal with the skills necessary to facilitate an interpersonal relationship, a feeling of community, of safety among the workshop participants must be constructed as a first step. In the resulting warm atmosphere true feelings are more likely to be expressed and the task to be undertaken will advance more rapidly.

2. Personal Values of Participants

Rationale: A great deal of emotional distance is likely to exist between the Learners' Advisors and the Adult Learners. Among the factors creating this distance are: disparity of age and of educational background. In addition, a Learners' Advisor has selected the profession of Library Science and sees a career path ahead while the Adult Learner is struggling with such issues as, selecting an educational and vocational or career path. It is crucial that great empathy exist between Adult Learner and Learners' Advisor. To accomplish this end the workshop participants will deal extensively with their own values.

3. Interview Techniques

Rationale: Part of the process of getting involved as an Adult Learner involves the completion of interview forms. This process should not only run smoothly, but, properly handled, can also yield information of great value to the Learners' Advisor in making decisions and giving advice.

4. Listening Skills

Rationale: The ability to elicit both information and feelings from an Adult Learner can be blocked by several obstacles, including lack of empathy, conflicting values, distractions or personal concerns of the listener and simple lack of listening skills. Exercises will be participated in which first point out that blocks do exist which prevent us from hearing the real meaning

which the speaker wished to convey. Secondly, we will practice reflecting back to the listener our perception of the essence of what we heard. This second step will prevent misunderstandings, make the advising process work smoothly and encourage the Adult Learner in the belief that he or she has really been understood.

5. Communicating Skills

Rationale: In one sense, this is the complement of listening skills and is needed to feed back, or reflect, what the Adult Learner has said. However, these skills are needed at all points in the Learner-Advisor relationship, which, ideally, will be of a long term nature. Skills in communication will go a long way in preventing judgmental behavior on the part of the Advisor and in solving problems if they arise.

6. Group Discussion

Rationale: It is likely that the library staff will have feelings about filling the role of Learners' Advisor. On the negative side, this is a new duty to be performed without the elimination of any other duties and without any increase in salary. It also thrusts them into a long-term one-to-one relationship with an adult patron dealing with the weighty issues of values and careeer choices. No preparation for such interpersonal relationships is provided in the graduate training of librarians. This should leave most of the participants beginning this workshop feeling unprepared for the role of Learners' Advisor and some of them feeling resentful since such a role was not part of the librarian's job when they entered the field. On the positive side this Adult Learner project is exciting not only because it is an effort to try something new but also because it further formalizes the librarian's role as a helping professional. This should open up a whole new area of personal satisfaction for a librarian who can follow the progress and growth of the Adult Learner over an extended period. In addition, the whole alternative education movement is blossoming around the country to meet the shortcomings of mainstream schools, to give

treatment to troubled adolescents and now, under this project, to provide a second chance to adults who want an education. The workshop participants are in the forefront of this movement which should provide personal pride and interesting future career opportunities.

Unless negative feelings about this project can be given vent to, conscious or unconscious opposition to the project will result. In addition, if none of the librarian participants see all the advantages of this project, the trainers will be able to present them during the discussions.

Group I

1. Schedule

Session I

- Community Building
- Personal Values
- Communication Skills
  - "Homework" - reading assignment
    Practice use of communication skills

Session II

- Community Building
- Personal Values - discussion of reading assignment
- Debriefing Communication Skills Assignment
  - "Homework" - Practice of communication skills

Session III

- Debriefing Communication Assignment
- Group Discussion - Pro and con on the Adult Learners' project
- Listening Skills
  - "Homework" - Practice communication and listening skills

Session IV

- Debriefing Communication and Listening Assignments
- Interviewing Techniques
- Concluding Discussion

2. Techniques

Session I

- Community Building: Valuing Techniques (name tag, I Am Proud, Either-Or Forced Choice), Warm Ups (milling, non-verbal greeting)
- Personal Values: Paper and pencil assignment centering around the following problem: Your M.L.S. degree is gone; you only have a Bachelor's degree. What would you do if you had to choose a career other than Library Science? Read plans in small groups. Discuss in entire group the implications of this exercise as it applies to the Adult Learner.

- Communication Skills: Lecture, pencil and paper exercise, role plays.

For next assignment: The Student As Nigger a collection of essays in paperback form by Jerry Farber (New York: Pocket Books)

Session II

- Community Building: Warm ups
- Personal Values: Life Line, Two Ideal Days, Epitagh, Group Discussion on The Student As Nigger and its implications for having empathy toward the Adult Learner.
- Debriefing Communication Skills Assignment: Group discussion.

Session III

- Debriefing Communication Assignment: Small group discussion.
- Group Discussion Pro and Con on the Adult Learners' Project: Debate in either fishbowl or entire group or both.
- Listening Skills: Rogerian Listening, Triads

Session IV

- Debriefing Communication and Listening Assignments: Entire group discussion, role plays.
- Interview Techniques: Lecture, paper and pencil exercise using actual interview form on one another in dyads.
- Concluding Discussion: Entire group discussion, I Learned and I Wonder statements.

TRAINING SESSION EVALUATION: INTERPERSONAL COMMUNICATION AND INTERVIEWING TECHNIQUES

The training on interpersonal communication and interviewing techniques consisted of four 1/2 day sessions. The attendance at each session varied. Nineteen of those attending returned evaluation forms.

In general the sessions received excellent ratings from the staff. The overall rating was:

	No. of Respondents	Percentage of Respondents
Terrible	0	0
Very Poor	0	0
Below Average	0	0
Average	0	0
Above Average	1	5.3
Very Good	9	47.4
Excellent	9	47.4

Most of the respondents found the subject content relatively complex but very practical and useful.

Subject Content		No. of Respondents	Percentage of Respondents
Simple	1	0	0
↑	2	2	10.5
↕	3	7	36.8
↓	4	7	36.8
Complex	5	3	15.8
All theory, little practical value	1	0	0
↑	2	0	0
↕	3	0	0
↓	4	3	15.8
Very practical and useful	5	16	84.2

Information Presented		No. of Respondents	Percentage of Respondents
Very helpful	1	15	78.9
↑	2	3	15.3
↕	3	0	0
↓	4	1	5.3
Not helpful	5	0	0

The consultant team got unanimously excellent ratings on their degree of enthusiasm and primarily good ratings on their knowledge of the subject area.

Consultants		No. of Respondents	Percentage of Respondents
Unenthusiastic	1	0	0
↑	2	0	0
↕	3	0	0
↓	4	0	0
Enthusiastic	5	19	100
Knew the subject well	1	5	26.3
↑	2	10	52.6
↕	3	1	5.3
↓	4	1	5.3
Lacked an essential grasp of subject	5	2	10.5

Most of the respondents found the consultant's manner of presentation to be clear and interesting.

Presentation		No. of Respondents	Percentage of Respondents
Muddled	1	0	0
↑	2	0	0
↕	3	0	0
↓	4	5	26.3
Clear	5	14	73.7

Presentation		No. of Respondents	Percentage of Respondents
Boring	1	0	0
↑	2	0	0
↓	3	1	5.3
	4	3	15.8
Interesting	5	15	78.9

Most respondents (14 or 73.6%) changed their opinions about the capability of the library system to meet the needs of adult self-directed learners.

Of those who reported changes of opinion, their beliefs now are:

The Library is —		No. of Respondents	Percentage of Respondents
Able to meet learners needs	1	2	10.5
	2	9	47.4
↑	3	2	10.5
↓	4	1	5.3
Not able to meet learner needs	5	0	0

Most respondents (14 or 73.6%) also reported changes in opinion concerning their capability to serve as learner's advisors.

Of those who reported changes of opinion, they now believe:

They are —		No. of Respondents	Percentage of Respondents
Now yet capable of effectively serving as an advisor	1	0	0
	2	1	5.3
	3	3	15.8
↕	4	7	36.8
Capable of effectively serving as an advisor	5	3	15.8

APPENDIX C

COMMON DATA SYSTEM FORMS

Interview

Interview conducted: ☐ Phone ☐ In person

Date: _____

Time: Begun _____ Ended _____

The purpose of this form is to provide the advisor with information about the learner and to provide both the advisor and the learner with a common basis for working through the learning project. This form should be filled out by the advisor.

General Information about Learner

1. Learner _____ 2. ☐ Male ☐ Female

3. Address _____
Street City State Zip

4. _____
Home phone Business phone Best time to call

5. ☐ Resident ☐ Nonresident ☐ In-service area

6. Specific occupation _____

7. Occupational category *(Coder will complete)*:

☐ Housewife ☐ Manager, administrator ☐ Retired
☐ Blue collar worker ☐ Other white collar worker ☐ Student
☐ Professional ☐ Unemployed ☐ Other

8. Age *(circle one)*: —18 18-24 25-34 35-44 45-54 55-64 65+ NR

9. Use of project library:
☐ Once or more a month ☐ Once or more every 6 months ☐ Once or more a year ☐ Less than once a year ☐ Never

10. Use of other libraries:
☐ Once or more a month ☐ Once or more every 6 months ☐ Once or more every year ☐ Less than once a year ☐ Never

11. Library card ☐ Yes ☐ No ☐ NA

12. Learned of Learner's Advisory Service through:
☐ Newspaper ☐ Radio ☐ TV
☐ Library display ☐ Community display ☐ Librarian ☐ Word of mouth
☐ Another agency ☐ Community outreach ☐ Other *(specify)* _____

13. Education completed:
☐ Eighth grade or less ☐ Some high school ☐ High school graduate
☐ Some college ☐ B.A. ☐ Graduate work

Elaborate: _____

 Form A: I.D. No. _____

Description of Learning Project

14. Learning goals *(select one)*:

☐ Educational credit ☐ Job advancement or change
☐ Increase knowledge ☐ Increase skill ☐ Contribute to community
☐ Pleasure and recreation ☐ Meet people with common interests

Elaborate goal:

15. Area of learning project *(select one)*:

☐ General works ☐ Philosophy
☐ Religion ☐ Social sciences ☐ Language ☐ Pure science
☐ Technology, applied science ☐ Arts ☐ Literature ☐ General geography and history

Elaborate area of interest:

16. Background knowledge/skill in learning area: ☐ No experience ☐ Some experience
☐ Expert Elaborate background:

17. Learning method preferred by learner *(select one)*:

☐ Books ☐ Audiovisual ☐ Programmed instruction
☐ Formal classes ☐ Informal discussions ☐ Other

Elaborate learning method:

18. Learning location preferred by learner *(select one)*:

☐ In library ☐ In classroom ☐ At home ☐ Other

Elaborate location:

19. Possible ways of helping the learner meet learning goal(s):

Description of Learning Project *(continued)*

20. Recommended sequence of learning project *(where to begin and steps to follow)*:

Advisory Service

21. ☐ Explaining independent learning program ☐ Clarifying learning goals
☐ Defining project scope ☐ Developing learning sequence

Elaborate service(s):

Information Support Service

22. ☐ Provide materials ☐ Refer outside library ☐ Refer inside library ☐ Gather information
☐ Provide study guide ☐ Provide resource list ☐ Other *(specify)*:

Elaborate service(s):

Steps to be taken before next appointment:

Next appointment date:

Comments:

Learner's Advisor

Progress Report

Contact: ☐ Phone ☐ In person

Date: _____

Time: Begun _____ Ended _____

Learner: _____

Visit No. _____

The purpose of this form is to provide a record for the learner and the advisor of the learner's progress. This form should be filled out by the advisor.

Modifications in Learning Project

1. Changes and/or elaborations in learning goals:

2. Changes in scope of area of interest: ☐ Broader ☐ Narrower

3. Elaborations of changes in area of interest:

4. Changes in ways of helping learner meet goals:

5. Changes, elaborations in sequence of learning project:

Advisory Service

6. ☐ Explaining independent learning program ☐ Defining project scope
   ☐ Clarifying learning goals ☐ Developing learning sequence

7. Elaborate service(s):

Information Support Service

8. ☐ Provide materials ☐ Provide study guide ☐ Provide resource list ☐ Gather information
   ☐ Refer outside library ☐ Refer inside library ☐ Other *(specify)*: _____

9. Elaborate service(s):

10. Steps to be taken before next appointment:

11. Next appointment date:

Learner's Advisor _____

Form B: I.D. No. _____

Progress Evaluation Interview

> The primary purpose of this form is **diagnostic.** It should help the advisor adjust to the needs of the learner. This form should be filled out by the advisor in **conversation** with the learner.

Contact: ☐ Phone ☐ In person

Date: _____

1. Learner _____

2. Does the learner feel that the learning project is moving at an adequate pace?

   ☐ Yes ☐ No ☐ Don't know

   Elaborate: _____

3. Does the learner feel that he/she is progressing toward his/her learning goal?

   ☐ Yes ☐ No ☐ Don't know

   Elaborate: _____

4. Has the advisor been available when needed? ☐ Yes ☐ No

   If "no," how can this problem be corrected? _____

5. Have the library facilities been conducive to the learner's project?

   ☐ Yes ☐ No ☐ NA

   If "no," how can this situation be improved? _____

6. Has the advisor provided the needed assistance in learning plan development?

   ☐ Yes ☐ No ☐ Don't know

   If "no," what should the advisor do? _____

Learner: _____

Date: _____

This form will provide a record of all material selected for the learner and the **learner's** evaluation of these materials. This form should be filled out by the advisor.

Materials Worksheet

Date selected	Date available	Type of material*	Materials description (Title and call number)	In collection		Not in collection		Usefulness							
				Available	Not available	ILL	Ordered	Appropriate	Too general	Too specific	Too advanced	Too elementary	Redundant	Irrelevant	Too old

*Print media: Books (including paperbacks), pamphlets, periodicals, microfilm.
Visual media: Films, slides, film strips, pictures, video cassettes.
Audio media: Records, tapes.
Study aids: Bibliographies, study guides, resource lists.

Form D: I.D. No. _____

Date: _____

Learner: _____

Referral Worksheet

This form will provide a record of all referrals made for a learner, an indication of whether appointments were kept, and the usefulness of each referral as judged by the learner.

Agency/Individual	Agency contact date	Learner's appointment date	Appointment kept	Useful	If not kept or not useful (give reason)

The purpose of this form is to get the learner's impressions of the advisory service. The learner fills out the form.

Learner's Evaluation

Questions	Evaluations				
	Never	Seldom	Sometimes	Often	Always
1. Was the library open when you needed it?					
2. Were the library facilities helpful to you in doing your learning project?					
3. Was the Learner's Advisor available when you wanted to talk?					
4. Were you comfortable in talk- g to the Learner's Advisor about what you wanted to learn?					
5. Did the Learner's Advisor understand what you wanted to learn?					
6. Was the Learner's Advisor helpful in developing a plan for your learning (helping you decide how to begin and what to do)?					
7. Were the right materials (books, tapes, etc.) available when you needed them?					
8. Were the materials given to you by the Learner's Advisor useful in helping you learn what you wanted to learn?					
9. If you used a list of resources or a study guide in your learning, were they helpful?					
10. If you were referred to another agency did that agency help you in your learning project?					
11. Overall were you satisfied with the help provided to you by the Learner's Advisory Service?					

(over)

12. Would you use the service again? ☐ Yes ☐ No ☐ Don't know

13. Would you recommend the service to someone else? ☐ Yes ☐ No ☐ Don't know

14. How do you think you have changed as a result of your project and the help the library has provided?

Learner's name

Date

The purpose of this form is to obtain the advisor's overall evaluation of the experience with the learner. Advisors fill out this form.

Learner's Advisor Evaluation

Questions	Evaluations				
	Never	Seldom	Sometimes	Often	Always
1. Was the learner comfortable in talking to you about what he/she wanted to learn?					
2. Did you understand what the learner wanted to learn?					
3. Were you helpful in developing a learning plan?					
4. Were you available when the learner wanted to talk?					
5. Were appropriate materials available for the learner when he/she needed them?					
6. Were the materials that you provided the learner useful in helping him/her reach his/her learning goal?					
7. If you provided a study aid was it useful to the learner?					
8. If you referred the learner to an outside agency was this agency helpful to the learner?					
9. Overall were you satisfied with how you helped the learner with his/her learning project?					

(over)

10. Did you feel you had enough time to work with the learner? ☐ Yes ☐ No

If "no," please comment:

11. Were the facilities and equipment in the library sufficient for what you needed to help the learner? ☐ Yes ☐ No

If "no," please comment:

12. Did you see indications of change in the learner as a result of his/her projects?

Learner's Advisor

I.D. No.

Date